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# *********BULLETIN*********

## The following are the changes and corrections to THE 1991 U.S. HISPANIC MARKET STUDY. We hope these revisions do not inconvenience you in anyway.

| | |
|---|---|
| Pg.6 | Paragraph 1-The Hispanic rate of growth during this period (1950-1991) was over 500%. |
| Pg.11 | Table: Top Nine US States, Col. 1: 1991 Hispanic State/ADI Change Population Estimates As Follows: Chicago* 925.5, Other Areas 171.2, Add Asterisk To Denver |
| Pg. 22 | Table: US/Canada Population 1990 278.2 million |
| Pg.62A | See Attached INSERTED |
| Pg 138 | Table: Credit Card Ownership. Delete Entire Fourth Line Total * (Does Not Account For Duplication) |
| Pg.148 | Table:Store Where Television Set Was Purchased Non-Hispanic-Other: 9.3% |
| Pg.150 | See Attached INSERTED |
| Pg.152 | Table:Store Video Camera Purchase Non-Hispanic-Catalog: 1.4% |
| Pg.156 | See Attached INSERTED |
| Pg.158 | Table:Store Origin Of Portable Stereo. . . Hispanics-West-Catalog: 2.0% |
| Pg.206 | Hidalgo County is where the City of McAllen is located. . . Brownsville is located in Cameron County . . . |
| Pg.244A | Insert:See Attached. INSERTED |
| Pg.282A | Insert:See Attached. INSERTED |
| Pg.326-329 | Replace:See Attached. INSERTED |

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# 1991

# U.S. HISPANIC MARKET

Strategy Research Corporation

**STRATEGY RESEARCH CORPORATION**
**100 N.W. 37TH AVENUE**
**MIAMI, FL 33125**

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The **1991 U.S. HISPANIC MARKET STUDY** is available at a cost of **$195 per copy.** Requests for copies, or for Assimilation-based cross-tabulation reports, should be addressed to Strategy Research Corporation, 100 NW 37th Avenue, Miami, FL 33125.
Telephone: (305) 649-5400.

# 1991 U.S. HISPANIC MARKET STUDY
## TABLE OF CONTENTS

**PAGE NUMBER**

***ACKNOWLEDGEMENTS***
***SPONSOR HONOR LIST***
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I. **FOREWORD** 1

A. SUMMARY OF THE REPORT 1
B METHODOLOGY 3

II. **U.S. HISPANIC POPULATION** 5

A. 1991 U.S. HISPANIC POPULATION ESTIMATE 5
B. PROPORTION OF TOTAL U.S. POPULATION 5
C. U.S. HISPANIC POPULATION GROWTH 1950 - 1991 6
D. 1991 HISPANIC POPULATION: ADI'S AND STATES 7
  1. Top Hispanic ADI's 7
  2. Regions and States 12
  3. Population and Households 17
  4. Hispanic Population Projections 22

E. RESULTS OF THE 1990 CENSUS: THE UNDERCOUNT 24
F. HISPANIC POPULATION UNDERCOUNT 26
Strategy Research and Census Comparisons 27

III. **IMMIGRATION TO THE UNITED STATES** 30

A. HISTORICAL PERSPECTIVE 30
  1. Population Growth 1790-1850 30
  2. Population Growth 1850-1900 31
  3. Population Growth 1900-1991 33
B. COUNTRY OF ORIGIN 35
C. CURRENT IMMIGRATIONS PATTERNS AND TRENDS 37
  1. Documented Immigration 1951-1989 37
  2. Countries of Birth 38
  3. Geographic Distribution 41
D. UNDOCUMENTED IMMIGRATION UPDATE 46
E. 1991 U.S. PERSPECTIVE 54
Immigration Act of 1990 54
F. SUMMARY 56

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## 1991 U.S. HISPANIC MARKET STUDY
## TABLE OF CONTENTS
(Continued)

PAGE NUMBER

**IV. POPULATION AND DEMOGRAPHIC PROFILE** 58

A. WORLD RANK 58
B. COUNTRY OF ORIGIN 59
C. PLACE OF BIRTH 63
D. LENGTH OF RESIDENCY 64
E. AGE/GENDER DISTRIBUTION 65
F. HOUSEHOLD SIZE 66
G. EDUCATION 67
H. EMPLOYMENT 68
  1. Full-time Employment 68
  2. Full-Time Employment - Women 69
I. OCCUPATION 70

**V. ASSIMILATION** 71

A. OVERVIEW 71
  1. Patterns of Assimilation 71
  2. Assimilation Among U.S. Hispanics 73
  3. Assimilation Cross Tabulations 76
B. LANGUAGE PATTERNS 80
  1. First Language Spoken 81
  2. Most Comfortable Language 82
  3. Frequency of Language Use 85
  4. Language Skills 95
  5. Importance of Children Learning to Read and Write Spanish and English 107
C. SOCIAL ATTITUDES 109
  1. Self Identification 109
  2. Identification of Close Friends 111
  3. Neighborhood Composition 114
  4. Projection of Self Identification 117

**VI. SPANISH LANGUAGE MEDIA HABITS** 121

A. TELEVISION 124
B. RADIO 126
C. NEWSPAPERS 128
D. MAGAZINES 129

**VII. INCOME AND BUYING POWER** 131

A. HOUSEHOLD INCOME 131
B. REGIONAL HOUSEHOLD INCOME 134
C. U.S. HISPANIC BUYING POWER 135

# 1991 U.S. HISPANIC MARKET STUDY
## TABLE OF CONTENTS
(Continued)

PAGE NUMBER

VIII. PERSONAL FINANCE 137

A. CREDIT CARDS 137
  1. Incidence of Card Application 137
  2. Incidence of Card Ownership 138
B. FINANCIAL SERVICES USAGE 140
  1. Banking Services 140
  2. Other Financial Services 141

IX. ACTIVITIES 142

A. TRAVEL HABITS 142
B. VEHICLE RENTAL 143
C. HOME REMODELING / DECORATING 143

X. PRODUCT PURCHASING HABITS 144

A. ATHLETIC SHOES 144
  1. Incidence of Ownership 144
  2. Store/Price of Most Recent Purchase 145
B TELEVISION SET OWNERSHIP 146
  1. Incidence of Ownership 146
  2. Most Recent Purchase 147
  3. Store/Price of Most Recent Purchase 148
C. VCR OWNERSHIP 149
  1. Incidence of Ownership 149
  2. Store/Price of Most Recent Purchase 149
D. VIDEO CAMERA OWNERSHIP 151
  1. Incidence of Ownership 151
  2. Store/Price of Most Recent Purchase 151
E. HOME STEREO OWNERSHIP 153
  1. Incidence of Ownership 153
  2. Store/Price of Most Recent Purchase 153
F. COMPACT DISC EQUIPMENT OWNERSHIP 155
  1. Incidence of Ownership 155
  2. Store/Price of Most Recent Purchase 155
G. PORTABLE CASSETTE OWNERSHIP 157
  1. Incidence of Ownership 157
  2. Store/Price of Most Recent Purchase 157
H. HISPANIC GROCERY SHOPPING PATTERNS 160
  1. Types of Stores Patronized 160
  2. Average Weekly Grocery Expenditures 162
I. WOMEN'S CLOTHING SHOPPING 163
J. SHOPPING WITH CHILDREN AMONG HISPANICS 165

## 1991 U.S. HISPANIC MARKET STUDY
## TABLE OF CONTENTS
## (Continued)

PAGE NUMBER

K. DISCOUNT COUPON USAGE 166
- 1. Incidence of Coupon Usage 166
- 2. Regional Frequency of Coupon Usage 167
- 3. Coupon Sources 168

L. LUXURY/EXPENSIVE ITEMS OWNERSHIP 170

XI. MARKET (ADI) EVALUATIONS 171

- 1 Los Angeles 172
- 2 New York 176
- 3 Miami 182
- 4. San Antonio 186
- 5. San Francisco 192
- 6. Chicago 196
- 7. Houston 201
- 8 McAllen-Brownsville 206
- 9 Albuquerque 210
- 10 El Paso 218
- 11 San Diego 222
- 12 Fresno 226
- 13 Dallas-Ft. Worth 230
- 14 Phoenix 236
- 15 Sacramento-Stockton 241
- 16 Corpus Christi 245
- 17 Denver 249
- 18 Tucson 256
- 19 Philadelphia 259
- 20 Salinas-Monterey 263
- 21 Austin 266
- 22 Tampa-St. Petersburg 270
- 23 Laredo 273
- 24 Boston 276
- 25 Odessa-Midland 280
- 26 Bakersfield 283
- 27 Lubbock 286
- 28 El Centro-Yuma 291
- 29 Washington, D.C. 294
- 30 Santa Barbara-Santa Maria-San Luis Obispo 300

# 1991 U.S. HISPANIC MARKET STUDY
## TABLE OF CONTENTS
## (Continued)

PAGE NUMBER

### MARKET EVALUATIONS (Continued)

31 Colorado Springs 303
32 Hartford-New Haven 307
33 Salt Lake City 310
34 Detroit 316
35 Seattle-Tacoma 319
36 Waco-Temple 323
37 Amarillo 326
38 Portland, OR 331
39 Orlando-Daytona Beach-Melbourne 336
40 Yakima 339
41 Milwaukee 342
42 West Palm Beach-Ft. Pierce-Vero Beach 345
43 Las Vegas 348
44 New Orleans 351
45 Palm Springs 354
46 Atlanta 357
47 Cleveland 364
48 Kansas City 368
49 Abilene-Sweetwater 373
50 Providence-New Bedford 376

### APPENDIX

1990 Census Critique i

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# I

# FOREWORD

# I. FOREWORD

## A. SUMMARY OF THE REPORT

The U.S. Hispanic population continues to experience very substantial and dynamic growth. Strategy Research Corporation has estimated the U.S. Hispanic population to be 24.9 million as of January 1, 1991. Considering the vastly divergent makeup of this population, derived from so many different countries and cultures, it has been all the more important that this market be carefully and accurately measured. This measurement has been important not only in terms of its actual population numbers, but also in terms of the market distinctions and implications of these populations. **This has been the source of Strategy Research Corporation's commitment to providing definition of this major phenomenon.**

The **1991 U.S. HISPANIC MARKET STUDY** begins with Strategy Research's estimates of the country's January 1, 1991 Hispanic population for the top Hispanic ADI's. The **STUDY** also provides a look at the preliminary results of the 1990 Census enumeration of the country's Hispanic population, and presents a comparison with Strategy Research Corporation's Hispanic population estimates for 1990.

In mid-1989, Strategy Research Corporation began the research that would lead to its publishing, in October of that year, its estimates for the 1990 U.S. Hispanic population. We then waited for the Census Bureau to make its 1990 enumeration and release its Hispanic population counts. Like the Englishmen digging the "Chunnel", the railroad tunnel beneath the English Channel, we waited to see if our counterparts at the Census Bureau would be matching our projected path or not.

We didn't just sit and do nothing at our end of the tunnel, though. We conducted a random sample interview survey among approximately 5,000 Hispanic heads of household throughout the United States. Among other objectives, a major purpose of this research was to determine the number of Hispanics who had been counted and who had not been counted by the 1990 Census. From this national survey, we found that **12.9% of Hispanic households throughout the country did not receive a Census form or were not in any way counted by the 1990 Census!** Clearly then, the count of U.S. Hispanics by the 1990 Census will contain an undercount of almost 13%.

The preliminary count of ethnic populations for states, counties and cities, was published by the Census Bureau in mid-March, 1991, eighteen months following the publication of Strategy Research Corporation's 1990 U.S. Hispanic population estimates. **The Census results reveal that Strategy Research's estimates for the major Hispanic markets have been remarkably accurate.** Moreover, the preliminary Census reports confirm the results of Strategy Research's nationwide survey that there is indeed an undercount of the U.S. Hispanic population.

A comparison of the preliminary Census data and SRC's 1990 estimates show that the 1990 Census validates SRC's 1990 Hispanic population estimates, particularly in the major Hispanic markets. However, it is also quite clear that the Census, as well as Strategy Research, has undercounted the Hispanic population in other markets, particularly in the border, and smaller or more rural Hispanic markets of the country. The **1991 U.S. HISPANIC MARKET STUDY** addresses the issue of this undercount in detail.

Businesses require strategies and strategies have to be based on what can be reasonably anticipated to occur in the immediate and foreseeable future. To that end, Strategy Research Corporation offers in this **1991 U.S. HISPANIC MARKET STUDY**, its projections of the U.S. Hispanic population for the Decade of the 1990's.

We have continued to carefully monitor the status of legal and illegal immigration of Hispanics from Central and South America, and the Caribbean. Some favorable economic and political shifts have begun to take place in some Latin countries, most notably in Nicaragua, El Salvador and Panama. These and other similar changes may impact the flow of immigration to the United States from the Southern Hemisphere.

The quickly changing political and economic landscapes of the Central and South Americas, and indeed, around the world, will greatly influence immigration trends throughout the decade of the nineties. Strategy Research has been, and will continue to be, closely monitoring these events in order to continue to provide the U.S. business community with the most accurate information about Hispanics in the U.S.A. We will continue to count their numbers, identify their characteristics, measure their impact on the country's economy, and draw implications that will serve and support the efforts of marketers, advertisers and providers of products and services.

The **1991 U.S. HISPANIC MARKET STUDY** deepens the conversation and exploration of Hispanic assimilation. During the two years between **MARKET STUDIES**, Strategy Research has continued its investigation of this critical subject. For the past two years, SRC has been developing a methodology that would provide an accurate measurement for degrees of assimilation of a particular population and the degree and manner in which a particular level of assimilation should be considered in targeting marketing efforts. To this end, Strategy Research has developed an **ASSIMILATION MODEL** that can be applied to all our data collection methodologies, and can address all manifestations of assimilation.

Finally, our interviews have revealed some very interesting and valuable information concerning Spanish and English language use among Hispanics, buying habits of Hispanics as compared with non-Hispanics, product ownership and buying patterns, media use habits, financial services utilization, including credit card ownership, and a number of important demographic characteristics. Much of this information has been developed and reported for the Hispanic Market as a whole as well as for the five regions of the United States.

## B. METHODOLOGY

The primary method of data collection used for this study consisted of personal interview surveys conducted by Strategy Research Corporation. These surveys, conducted during 1990 and 1991, have been analyzed to provide the basis for population estimates and forecasts, along with a significant amount of other data published by various reliable sources, including the Bureau of the Census, the U.S Department of Immigration and Naturalization, Market Statistics, Inc., and various state, regional and local planning agencies.

With regard to current Shopping Patterns, Product Usage and Language Patterns, the primary research conducted by Strategy Research Corporation for this study also consisted of the survey research method.

The sample for this research consisted of a total of 5,000 door-to-door personal interviews conducted within 29 U.S. Hispanic markets using a stratified, segmented, random probability sample of households.

Samples for all interviewing were drawn by Strategy Research Corporation's professional sampling staff. A clustering technique was used for the interviews among all Hispanics, procedural in samples for in-home surveys. The sampling cluster points were actual census blocks designated by the U.S. Bureau of the Census. Every Census block which has at least one Hispanic was included in the sample universe. SRC maintains currently updated census block, census tract, and household survey data for survey and economic research purposes that reflect current population and household distributions and location of Hispanic households. A random probability sample was pulled, using a random starting point and a sequential interval of residences.

Once a random skip pattern was established, sampling points were assigned to their appropriate Census blocks. These statistics were transferred to Census block maps and then to street maps. For each block, one of six random house selection patterns was chosen randomly, and individual block maps were labeled with street names, starting points, skip patterns, and rotation directions. Nine interviews were completed within each cluster, which corresponds to one Census block.

Interviewing specifically for this Study was conducted in January and February, 1991. Interviews were conducted by trained, professional interviewers of Strategy Research Corporation, working under the direct supervision of SRC staff field supervisors. Spanish and English versions of the Hispanic questionnaires were prepared. All interviews among Hispanics were conducted by Hispanic, bilingual interviewers.

A minimum of 20% of each interviewer's work was validated daily by staff supervisors of Strategy Research Corporation. All questionnaires were then carefully edited, coded and prepared for computer tabulation. All programming and data processing was done in-house at Strategy Research Corporation.

The sample utilized for the Product Usage data among non-Hispanic households included 600 telephone interviews conducted in major markets throughout the United States, using a national probability sample.

**Technical Note:**

The definition of an Hispanic is a person who designates himself/herself to be of Hispanic origin or of Hispanic ancestry. This is the same definition currently employed by the Bureau of the Census.

Strategy Research Corporation employs the best of industry practices and standards in its work and utilizes the best efforts to produce reliable studies. It is a member of the Council of American Survey Research Organizations (CASRO), and the American Marketing Association.

No claim is made that this Study is free of all errors, and the Firm accepts no liability for the information or interpretation included within this Report.

# II. U.S. HISPANIC POPULATION

## II. U.S. HISPANIC POPULATION

### A. 1991 U.S. HISPANIC POPULATION ESTIMATE

Strategy Research estimates the January 1, 1991 U.S. Hispanic population to be

**24,925,200**

### B. PROPORTION OF TOTAL 1991 U.S. POPULATION

As shown on the following table, the 24.9 million U.S. Hispanics represent approximately 10% of the total U.S. population of 251.4 million. These figures are as of January 1, 1991.

**TOTAL AND U.S. HISPANIC POPULATION 1991**

| | |
|---|---|
| Total U.S. Population | 251,400,000 |
| Total Hispanic Population | 24,925,200 |
| Hispanic Population As a Percent of Total U.S. Population | 9.9% |

Source: Market Statistics, Inc.
U.S. Immigration and Naturalization Service
Strategy Research Corporation

## C. U.S. HISPANIC POPULATION GROWTH: 1950 - 1991

The total population of the United States increased from 151.3 million in 1950 to approximately 251.4 million in 1991. This represents a numerical gain of some 100.1 million persons. The rate of growth experienced by the country during these 41 years was close to 70%. During this same period of time, the number of Hispanics residing in the U.S. increased from a low base of only 4.0 million to an estimated 24.9 million. This represented an increase of some 20.9 million persons, or about 21% of the country's total population growth during the 41 years. The Hispanic rate of growth during this period was over 400%.

### TOTAL U.S. POPULATION AND TOTAL U.S. HISPANIC POPULATION 1950-1991

| | Population | |
|---|---|---|
| | Total U.S. (In Millions) | U.S. Hispanics (In Millions) |
| 1950 | 151.3 | 4.0 |
| 1960 | 179.3 | 6.9 |
| 1970 | 203.2 | 9.0 |
| 1980 | 226.5 | 14.6 |
| 1991 | 251.4 | 24.9 |

Source: U.S. Census Bureau
Market Statistics, Inc.
U.S. Immigration and Naturalization Service
Strategy Research Corporation

## D. 1991 HISPANIC POPULATION: ADI'S AND STATES

### 1. Top Hispanic ADI's

The following table presents the estimated 1991 Hispanic populations for the top twenty U.S. Hispanic ADI's. As indicated, the top three ADI's, Los Angeles, New York and Miami, contain a combined total of approximately 9.3 million Hispanic residents, representing more than one-third (37%) of the total 1991 U.S. Hispanic population.

The next seven most populated Hispanic ADI's in the country, including San Antonio, San Francisco, and Chicago (each with close to one million Hispanics), combined, contain another 5.7 million Hispanics, or 23% of the total 1991 U.S. Hispanic population. The top ten ADI's then, contain a total of just over 15 million Hispanic residents, or just over 60% of the country's total number of Hispanics.

The 1991 Hispanic population of ADI numbers 11 through 20, which include San Diego, Fresno and Dallas-Ft. Worth, (each with better than one-half million Hispanics) amounts to close to 4 million, or approximately 16% of the total U.S. Hispanic population.

**Thus, the top twenty Hispanic ADI's in the U.S. contain a combined total of better than 19 million Hispanics, who accounted for more than three-fourths (76%) of the country's total 1991 Hispanic population.**

The next table on Page 9, presents the 1991 Hispanic population estimates for the balance of the top fifty U.S. Hispanic markets, and the proportion of Hispanics that comprises each ADI's total population.

## HISPANIC POPULATION FOR TOP TWENTY U.S. HISPANIC ADI'S

## 1991

| ADI | RANK | HISPANIC POPULATION (000) | PERCENT OF TOTAL U.S. HISPANIC POPULATION | PERCENT HISPANIC OF TOTAL ADI POPULATION |
|---|---|---|---|---|
| LOS ANGELES | 1 | 5,194.7 | 20.9% | 30.8% |
| NEW YORK | 2 | 2,998.7 | 12.0 | 14.1 |
| MIAMI | 3 | 1,102.7 | 4.4 | 29.2 |
| **SUB-TOTAL** | | **9,296.1** | **37.2%** | - |
| SAN ANTONIO | 4 | 998.9 | 4.0% | 49.4% |
| SAN FRANCISCO | 5 | 986.5 | 4.0 | 15.0 |
| CHICAGO | 6 | 985.3 | 4.0 | 9.9 |
| HOUSTON | 7 | 859.3 | 3.4 | 18.8 |
| MCALLEN/BRNSVILE | 8 | 697.9 | 2.8 | 88.0 |
| ALBUQUERQUE | 9 | 615.7 | 2.5 | 38.4 |
| EL PASO | 10 | 583.5 | 2.3 | 68.1 |
| **SUB-TOTAL** | | **5,727.1** | **23.0%** | - |
| **TOP 10 ADI'S** | | **15,023.2** | **60.2%** | - |
| SAN DIEGO | 11 | 543.7 | 2.2% | 18.7% |
| FRESNO | 12 | 542.0 | 2.2 | 35.5 |
| DALLAS-FT. WORTH | 13 | 525.7 | 2.1 | 9.7 |
| PHOENIX | 14 | 461.4 | 1.8 | 16.2 |
| SACRAMENTO | 15 | 439.9 | 1.8 | 14.4 |
| CORPUS CHRISTI | 16 | 403.8 | 1.6 | 55.5 |
| DENVER | 17 | 312.2 | 1.2 | 10.0 |
| TUCSON | 18 | 268.5 | 1.1 | 27.8 |
| PHILADELPHIA | 19 | 264.6 | 1.1 | 3.2 |
| SALINAS-MONTEREY | 20 | 237.6 | 1.0 | 28.1 |
| **SUB-TOTAL** | | **3,999.4** | **16.1%** | - |
| **TOP 20 ADI'S** | | **19,022.6** | **76.3%** | - |
| **TOTAL U.S. HISPANIC** | | **24,925.2** | **100.0%** | - |

Source: Market Statistics, Inc.
U.S. Immigration and Naturalization Service
Strategy Research Corporation

# HISPANIC POPULATION FOR
# TOP 21 - 50 U.S. HISPANIC ADI'S
## 1991

| ADI | RANK | HISPANIC POPULATION (000) | PERCENT OF TOTAL ADI POPULATION |
|---|---|---|---|
| AUSTIN | 21 | 224.4 | 21.0% |
| TAMPA-ST. PETERSBURG | 22 | 211.7 | 5.5 |
| LAREDO | 23 | 163.1 | 95.1 |
| BOSTON | 24 | 161.3 | 2.4 |
| ODESSA-MIDLAND | 25 | 155.3 | 30.9 |
| BAKERSFIELD | 26 | 155.2 | 27.0% |
| LUBBOCK | 27 | 151.2 | 30.5 |
| EL CENTRO-YUMA | 28 | 144.8 | 51.2 |
| WASHINGTON, D.C. | 29 | 144.2 | 3.0 |
| SANTA BARBARA | 30 | 124.8 | 19.5 |
| COLORADO SPRINGS | 31 | 120.5 | 16.5% |
| HARTFORD-NEW HAVEN | 32 | 114.3 | 4.2 |
| SALT LAKE CITY | 33 | 96.5 | 4.7 |
| DETROIT | 34 | 95.3 | 1.8 |
| SEATTLE-TACOMA | 35 | 90.1 | 2.6 |
| WACO-TEMPLE | 36 | 87.1 | 12.1% |
| AMARILLO | 37 | 86.8 | 17.3 |
| PORTLAND | 38 | 79.5 | 3.6 |
| ORLANDO-DAYTONA BCH. | 39 | 78.3 | 3.5 |
| YAKIMA | 40 | 71.5 | 14.3 |
| MILWAUKEE | 41 | 70.3 | 2.1% |
| WEST PALM BEACH, | 42 | 70.1 | 5.6 |
| LAS VEGAS | 43 | 69.4 | 10.0 |
| NEW ORLEANS | 44 | 68.2 | 3.7 |
| PALM SPRINGS | 45 | 64.1 | 20.7 |
| ATLANTA | 46 | 62.7 | 1.7% |
| CLEVELAND | 47 | 58.8 | 1.5 |
| KANSAS CITY | 48 | 48.7 | 2.4 |
| ABILENE-SWEETWATER | 49 | 48.0 | 15.2 |
| PROVIDENCE, R.I. | 50 | 39.3 | 2.6 |
| **TOTAL 21-50 ADI'S** | | **3,155.5** | **12.7%*** |
| **TOTAL U.S. HISPANIC** | | **24,925.2** | **100.0%** |

*Percent of total U.S. Hispanic population

Source: Market Statistics, Inc.
U.S. Immigration and Naturalization Service
Strategy Research Corporation

The following table depicts SRC's population estimate of the nine states (and their ADI's), containing the largest Hispanic populations in the U.S. as of January 1, 1991. These states account for close to 88% of the country's total Hispanic population. The top three states, California (36%), Texas (20%), and New York (10%), account for almost two-thirds (66%) of the total U.S. Hispanic population, with a combined total of 16.4 million Hispanic residents.

### TOP NINE U.S. STATES WITH LARGEST HISPANIC POPULATION 1991

| STATE / ADI | HISPANIC POPULATION (000) | PERCENT OF TOTAL POPULATION | PERCENT OF TOTAL U.S. HISPANIC POPULATION |
|---|---|---|---|
| **California** | **8,923.2** | **29.7%** | **35.8%** |
| Los Angeles | 5,194.7 | 30.8 | 21.1 |
| San Francisco | 986.5 | 15.0 | 4.0 |
| San Diego | 543.7 | 18.7 | 2.2 |
| Fresno | 542.0 | 34.2 | 2.2 |
| Sacramento | 439.9 | 14.4 | 1.8 |
| Salinas-Monterey | 237.6 | 28.1 | 1.0 |
| Bakersfield | 155.2 | 27.0 | 0.6 |
| Santa Barbara | 124.8 | 19.5 | 0.5 |
| El Centro* | 99.7 | 65.1 | 0.4 |
| Palm Springs | 64.1 | 20.7 | 0.2 |
| Other Areas | 535.0 | 65.6 | 2.1 |
| **Texas** | **5,059.8** | **29.5%** | **20.3%** |
| San Antonio | 998.9 | 49.4 | 4.1 |
| Houston | 859.3 | 18.8 | 3.5 |
| McCallen/Browns. | 697.9 | 88.0 | 2.8 |
| Dallas-Ft. Worth | 525.7 | 9.7 | 2.1 |
| El Paso* | 493.7 | 70.5 | 2.0 |
| Corpus Christi | 403.8 | 55.5 | 1.6 |
| Austin | 224.4 | 21.0 | 0.9 |
| Laredo | 163.1 | 95.1 | 0.7 |
| Odessa/Midland* | 153.1 | 31.1 | 0.6 |
| Lubbock | 151.2 | 30.5 | 0.6 |
| Waco-Temple | 87.1 | 12.1 | 0.4 |
| Amarillo* | 66.8 | 15.9 | 0.3 |
| Abilene/Sweetwater | 48.0 | 15.2 | 0.2 |
| Other Areas | 186.8 | 7.5 | 0.5 |
| **New York** | **2,442.7** | **13.4%** | **9.8%** |
| New York City* | 2,325.1 | 16.8 | 9.4 |
| Other Areas | 117.6 | 1.4 | 0.5 |

*In State only.

Continued......

## TOP NINE U.S. STATES WITH LARGEST HISPANIC POPULATION
## 1991
(Continued)

| STATE / ADI | 1991 HISPANIC STATE / ADI | PERCENT OF TOTAL POPULATION | PERCENT OF TOTAL U.S. HISPANIC POPULATION |
|---|---|---|---|
| | (000) | | |
| **Florida** | **1,570.3** | **12.0%** | **6.3%** |
| Miami | 1,102.7 | 29.2 | 4.5 |
| Tampa/St. Pete. | 211.7 | 5.5 | 0.8 |
| Orlando/Daytona | 78.3 | 3.5 | 0.3 |
| WP Beach/Vero Bch | 70.1 | 5.6 | 0.3 |
| Other Areas | 107.5 | 3.0 | 0.4 |
| **Illinois** | **1,096.7** | **9.5%** | **4.4%** |
| Chicago* | 985.3 | 9.9 | 4.0 |
| Other Areas | 111.4 | 3.0 | 0.4 |
| **Arizona** | **872.4** | **23.5%** | **3.5%** |
| Phoenix* | 455.6 | 16.1 | 1.8 |
| Tucson* | 265.0 | 27.7 | 1.1 |
| Other Areas | 151.8 | 64.6 | 0.6 |
| **New Jersey** | **747.8** | **9.6%** | **3.0%** |
| New York City* | 612.8 | 9.5 | 2.5 |
| Other Areas | 135.0 | 5.7 | 0.5 |
| **New Mexico** | **722.8** | **47.2%** | **2.9%** |
| Albuquerque* | 592.5 | 40.2 | 2.4 |
| Other Areas | 130.3 | 47.2 | 0.5 |
| **Colorado** | **473.6** | **14.2%** | **1.9%** |
| Denver | 302.7 | 13.3 | 1.2 |
| Colorado Springs | 120.5 | 16.5 | 0.5 |
| Other Areas | 50.4 | 10.4 | 0.2 |
| **Sub-Total** | **21,909.3** | **20.6%** | **87.9%** |
| **Other Areas** | **3,015.9** | **2.2** | **12.1** |
| **TOTAL U.S.** | **24,925.2** | **--** | **100.0%** |

*In state only

Source: U.S. Bureau of the Census
U.S. Immigration and Naturalization Service
Strategy Research Corporation

## 2. Regions and States

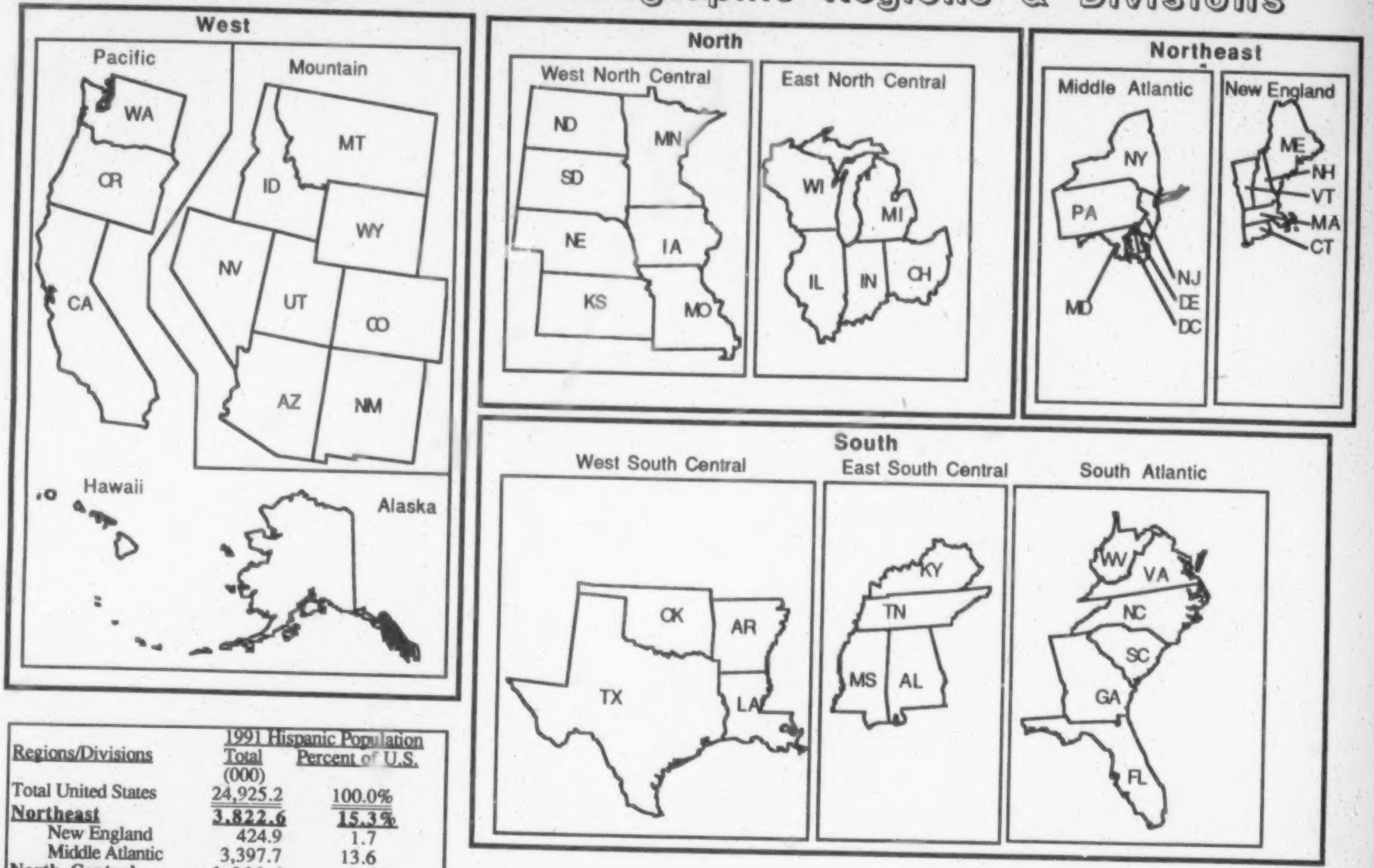
The following table presents a delineation of the 1991 U.S. Hispanic population by Census Geographic Regions and Divisions. The next page shows a map depicting these regional and divisional population distributions. The West Region contains the largest share of Hispanics, with 47% or 11.7 million. Some 80% (over nine million) of the West Region's Hispanic population is domiciled in the Pacific Division, which includes California and its 8.8 million Hispanics.

### U.S. HISPANIC POPULATION
### BY CENSUS REGION AND DIVISION
### 1980, 1985, 1991

| | U.S. HISPANIC POPULATION | | |
|---|---|---|---|
| Region/Division | 1980 (000) | 1985 (000) | 1991 (000) |
| **United States** | **14,603.7** | **17,562.9** | **24,925.2** |
| **Northeast** | **2,608.2** | **2,841.0** | **3,822.6** |
| New England | 299.5 | 324.2 | 424.9 |
| Middle Atlantic | 2,308.7 | 2,516.8 | 3,397.7 |
| **North Central** | **1,270.0** | **1,350.5** | **1,912.9** |
| E. North Central | 1,061.5 | 1,125.8 | 1,644.6 |
| W. North Central | 208.5 | 224.7 | 268.3 |
| **South** | **4,468.4** | **5,597.7** | **7,502.4** |
| South Atlantic | 1,192.1 | 1,444.0 | 2,067.7 |
| E. South Central | 119.2 | 133.5 | 152.3 |
| W. South Central | 3,157.1 | 4,020.2 | 5,282.4 |
| **West** | **6,257.1** | **7,773.7** | **11,687.3** |
| Mountain | 1,447.9 | 1,693.3 | 2,355.4 |
| Pacific | 4,809.2 | 6,080.4 | 9,331.9 |

Source: Market Statistics, Inc.
U.S. Bureau of the Census
U.S. Immigration and Naturalization Service
Strategy Research Corporation

# U.S. by Census Geographic Regions & Divisions


West
Pacific
Mountain
WA
OR
CA
MT
ID
WY
NV
UT
CO
AZ
NM
Hawaii
Alaska
North
West North Central
East North Central
ND
SD
NE
KS
MN
IA
MO
WI
MI
IL
IN
OH
Northeast
Middle Atlantic
New England
NY
PA
NJ
DE
DC
MD
ME
NH
VT
MA
CT
South
West South Central
East South Central
South Atlantic
TX
OK
AR
LA
KY
TN
MS
AL
WV
VA
NC
SC
GA
FL

|  | 1991 Hispanic Population |  |
|---|---|---|
| Regions/Divisions | Total (000) | Percent of U.S. |
| Total United States | 24,925.2 | 100.0% |
| **Northeast** | **3,822.6** | **15.3%** |
| New England | 424.9 | 1.7 |
| Middle Atlantic | 3,397.7 | 13.6 |
| **North Central** | **1,912.9** | **7.7%** |
| E. North Central | 1,644.6 | 6.6 |
| W. North Central | 268.3 | 1.1 |
| **South** | **7,502.4** | **30.1%** |
| South Atlantic | 2,067.7 | 8.3 |
| E. South Atlantic | 152.3 | 0.6 |
| W. South Atlantic | 5,282.4 | 21.2 |
| **West** | **11,687.3** | **46.9%** |
| Mountain | 2,355.4 | 9.5 |
| Pacific | 9,331.9 | 37.4 |

Source: U.S. Bureau of the Census
Strategy Research Corporation

The following table shows the distribution of the Hispanic population of the United States, for 1980, 1985 and 1991, based on a delineation of states according to Regions and Sub-Regions.

### U.S. HISPANIC POPULATION GEOGRAPHIC REGIONS AND STATES 1980, 1985, AND 1991

| | U.S. HISPANIC POPULATION | | |
|---|---|---|---|
| Regions/Sub-Regions/States | 1980 (000) | 1985 (000) | 1991 (000) |
| **TOTAL UNITED STATES** | **14,603.7** | **17,562.9** | **24,925.2** |
| **Northeast** | **2,608.2** | **2,841.0** | **3,822.6** |
| New England | 299.5 | 324.2 | 424.9 |
| Maine | 5.3 | 5.3 | 6.2 |
| New Hampshire | 5.2 | 5.8 | 8.3 |
| Vermont | 3.4 | 3.6 | 4.4 |
| Massachusetts | 141.4 | 152.8 | 202.1 |
| Rhode Island | 19.0 | 19.8 | 25.9 |
| Connecticut | 125.2 | 136.9 | 178.0 |
| Middle Atlantic | 2,308.7 | 2,516.8 | 3,397.7 |
| New York | 1,661.0 | 1,744.1 | 2,442.7 |
| New Jersey | 494.1 | 605.9 | 747.8 |
| Pennsylvania | 153.6 | 166.8 | 207.2 |
| **North Central** | **1,270.0** | **1,350.5** | **1,912.9** |
| E. North Central | 1,061.5 | 1,125.8 | 1,644.6 |
| Ohio | 120.0 | 119.4 | 144.6 |
| Indiana | 86.5 | 89.6 | 109.2 |
| Illinois | 634.6 | 681.4 | 1,096.7 |
| Michigan | 157.6 | 173.9 | 205.6 |
| Wisconsin | 62.8 | 61.5 | 88.5 |
| W. North Central | 208.5 | 224.7 | 268.3 |
| Minnesota | 32.1 | 33.4 | 41.1 |
| Iowa | 26.3 | 28.1 | 30.4 |
| Missouri | 51.9 | 54.4 | 64.8 |
| North Dakota | 3.5 | 4.3 | 4.7 |
| South Dakota | 3.8 | 4.4 | 5.2 |
| Nebraska | 28.3 | 31.6 | 35.6 |
| Kansas | 62.6 | 68.5 | 86.5 |

Continued.......

# U.S. HISPANIC POPULATION
# GEOGRAPHIC REGIONS AND STATES
# 1980, 1985, AND 1991

(Continued)

| | U.S. HISPANIC POPULATION | | |
|---|---|---|---|
| Region/Sub-Region /State | 1980<br>(000) | 1985<br>(000) | 1991<br>(000) |
| **South** | **4,468.4** | **5,597.7** | **7,502.4** |
| South Atlantic: | 1,192.1 | 1,444.0 | 2,067.7 |
| Delaware | 9.5 | 10.5 | 14.5 |
| Maryland | 63.2 | 70.3 | 90.7 |
| Dist. Of Columbia | 17.8 | 17.6 | 25.4 |
| Virginia | 79.7 | 87.8 | 115.2 |
| West Virginia | 13.1 | 12.6 | 14.0 |
| North Carolina | 56.0 | 59.7 | 77.9 |
| South Carolina | 33.7 | 35.1 | 44.9 |
| Georgia | 61.0 | 68.5 | 114.8 |
| Florida | 858.1 | 1,081.9 | 1,570.3 |
| E. South Central: | [illegible]9.2 | 133.5 | 152.3 |
| Kentucky | 27.0 | 31.6 | 32.9 |
| Tennessee | 34.0 | 40.4 | 46.4 |
| Alabama | 34.0 | 33.4 | 42.1 |
| Mississippi | 24.2 | 28.1 | 30.9 |
| W. South Central: | 3,157.1 | 4,020.2 | 5,282.4 |
| Arkansas | 17.0 | 17.6 | 21.9 |
| Louisiana | 99.7 | 105.4 | 118.9 |
| Oklahoma | 57.8 | 66.7 | 81.8 |
| Texas | 2,982.6 | 3,830.5 | 5,059.8 |
| **West** | **6,257.1** | **7,773.7** | **11,687.3** |
| Mountain: | 1,447.9 | 1,693.3 | 2,355.4 |
| Montana | 10.1 | 12.3 | 12.5 |
| Idaho | 36.6 | 42.4 | 57.3 |
| Wyoming | 24.5 | 29.9 | 30.9 |
| Colorado | 341.4 | 374.1 | 473.6 |
| New Mexico | 477.1 | 532.1 | 722.8 |
| Arizona | 444.1 | 563.8 | 872.4 |
| Utah | 60.0 | 75.5 | 86.2 |
| Nevada | 54.1 | 63.2 | 99.7 |
| Pacific: | 4,809.2 | 6,080.4 | 9,331.9 |
| Washington | 121.3 | 126.5 | 202.1 |
| Oregon | 66.2 | 73.8 | 104.7 |
| California | 4,541.3 | 5,790.5 | 8,923.2 |
| Alaska | 9.0 | 12.3 | 14.4 |
| Hawaii | 71.4 | 77.3 | 87.5 |

Source: Market Statistics, Inc.
Immigration and Naturalization Service
Strategy Research Corporation

## U.S. HISPANIC POPULATION GROWTH BY GEOGRAPHIC REGION 1980-1991

| | HISPANIC POPULATION CHANGE | | | | | |
|---|---|---|---|---|---|---|
| | 1980-1985 Change | | 1985-1991 Change | | 1980 - 1991 Change | |
| Region | Number | Percent | Number | Percent | Number | Percent |
| **UNITED STATES** | **2,959.2** | **20.3%** | **7,362.3** | **41.9%** | **10,321.5** | **70.7%** |
| **Northeast** | **232.8** | **8.9%** | **981.6** | **34.6%** | **1,214.4** | **46.6%** |
| New England | 24.7 | 8.2 | 100.7 | 31.1 | 125.4 | 41.9 |
| Middle Atlantic | 208.1 | 9.0 | 880.9 | 35.0 | 1,089.0 | 47.2 |
| **North Central** | **80.5** | **6.3%** | **562.4** | **41.6%** | **642.9** | **50.6%** |
| E. North Central | 64.3 | 6.1 | 518.8 | 46.1 | 583.1 | 54.9 |
| W. North Central | 16.2 | 7.8 | 43.6 | 19.4 | 59.8 | 28.7 |
| **South** | **1,129.3** | **25.3%** | **1,904.7** | **34.0%** | **3,034.0** | **67.9%** |
| South Atlantic | 251.9 | 21.1 | 623.7 | 43.2 | 875.6 | 73.4 |
| E. South Central | 14.3 | 12.0 | 18.8 | 15.8 | 33.1 | 27.8 |
| W. South Central | 863.1 | 27.3 | 1,262.2 | 31.4 | 2,125.3 | 67.3 |
| **West** | **1,516.6** | **24.2%** | **3,913.6** | **50.3** | **5,430.3** | **86.8%** |
| Mountain | 245.4 | 16.9 | 662.1 | 39.1 | 907.5 | 62.7 |
| Pacific | 1,271.2 | 26.4 | 3,251.5 | 53.5 | 4,522.8 | 94.0 |

Source: Market Statistics, Inc.
U.S. Bureau of the Census
Immigration and Naturalization Service
Strategy Research Corporation

## 3. Population and Households

The following table depicts each state's estimated 1991 Hispanic population and households, as well as the total population for each state. New Mexico continued to be the state with the highest percentage of Hispanics comprising its population, at 47%, followed by California, at 30%, Texas, at 30% and Arizona, with 24%. Hispanics represent almost 10% of the country's entire population.

### TOTAL U.S. AND U.S. HISPANIC POPULATION AND HOUSEHOLDS BY STATE
### 1991

| | HISPANIC POPULATION | HISPANIC HOUSEHOLDS | PERCENT OF STATE'S TOTAL POPULATION | STATE'S TOTAL POPULATION |
|---|---|---|---|---|
| Alabama | 42,120 | 11,600 | 1.0% | 4,084,300 |
| Alaska | 14,460 | 4,110 | 2.6 | 556,000 |
| Arizona | 872,400 | 240,360 | 23.5 | 3,704,900 |
| Arkansas | 21,930 | 6,800 | 0.9 | 2,376,200 |
| California | 8,923,200 | 2,259,480 | 29.7 | 30,081,900 |
| Colorado | 473,600 | 120,500 | 14.2 | 3,330,000 |
| Connecticut | 177,970 | 53,350 | 5.4 | 3,322,700 |
| Delaware | 14,460 | 4,100 | 2.1 | 673,400 |
| District Of Columbia | 25,420 | 9,500 | 4.1 | 613,500 |
| Florida | 1,570,300 | 542,060 | 12.0 | 13,077,900 |
| Georgia | 114,760 | 32,500 | 1.8 | 6,548,300 |
| Hawaii | 87,490 | 23,260 | 7.8 | 1,120,200 |
| Idaho | 57,330 | 16,380 | 5.6 | 1,017,600 |
| Illinois | 1,096,700 | 283,940 | 9.5 | 11,554,200 |
| Indiana | 109,170 | 29,900 | 1.9 | 5,604,100 |
| Iowa | 30,410 | 9,480 | 1.1 | 2,806,800 |
| Kansas | 86,490 | 21,300 | 3.5 | 2,504,400 |
| Kentucky | 32,900 | 10,230 | 0.9 | 3,725,200 |
| Louisiana | 118,890 | 40,440 | 2.8 | 4,265,600 |
| Maine | 6,230 | 1,820 | 0.5 | 1,241,200 |
| Maryland | 90,730 | 24,200 | 1.9 | 4,833,200 |
| Massachusetts | 202,140 | 60,200 | 3.3 | 6,081,500 |
| Michigan | 205,630 | 55,590 | 2.2 | 9,395,800 |
| Minnesota | 41,130 | 12,450 | 0.9 | 4,422,400 |
| Mississippi | 30,910 | 9,180 | 1.2 | 2,601,100 |

Continued. . . . .

# TOTAL U.S. AND U.S. HISPANIC POPULATION AND HOUSEHOLDS BY STATE

## 1991

(Continued)

| STATE | HISPANIC POPULATION | HISPANIC HOUSEHOLDS | PERCENT OF STATE'S TOTAL POPULATION | STATE'S TOTAL POPULATION |
|---|---|---|---|---|
| Missouri | 64,810 | 20,070 | 1.2 | 5,172,400 |
| Montana | 12,460 | 3,800 | 1.5 | 807,700 |
| Nebraska | 35,590 | 9,910 | 2.2 | 1,595,500 |
| Nevada | 99,700 | 33,740 | 8.2 | 1,214,800 |
| New Hampshire | 8,280 | 2,560 | 0.7 | 1,121,300 |
| New Jersey | 747,850 | 213,630 | 9.6 | 7,813,800 |
| New Mexico | 722,800 | 224,610 | 47.2 | 1,531,500 |
| New York | 2,442,700 | 832,190 | 13.4 | 18,185,000 |
| North Carolina | 77,930 | 22,590 | 1.2 | 6,700,300 |
| North Dakota | 4,740 | 1,200 | 0.7 | 645,700 |
| Ohio | 144,570 | 45,000 | 1.3 | 10,964,400 |
| Oklahoma | 81,760 | 23,820 | 2.6 | 3,179,600 |
| Oregon | 104,700 | 24,930 | 3.6 | 2,873,100 |
| Pennsylvania | 207,170 | 59,190 | 1.7 | 12,010,200 |
| Rhode Island | 25,920 | 8,200 | 2.6 | 1,014,300 |
| South Carolina | 44,870 | 13,100 | 1.3 | 3,524,400 |
| South Dakota | 5,180 | 1,450 | 0.7 | 703,500 |
| Tennessee | 46,360 | 14,050 | 0.9 | 4,929,900 |
| Texas | 5,059,800 | 1,343,930 | 29.5 | 17,170,200 |
| Utah | 86,240 | 23,850 | 5.0 | 1,741,500 |
| Vermont | 4,360 | 1,600 | 0.8 | 568,800 |
| Virginia | 115,150 | 32,400 | 1.8 | 6,254,300 |
| Washington | 202,140 | 50,500 | 4.1 | 4,919,300 |
| West Virginia | 13,960 | 5,010 | 0.8 | 1,812,900 |
| Wisconsin | 88,480 | 26,440 | 1.8 | 4,944,700 |
| Wyoming | 30,910 | 9,700 | 6.7 | 458,500 |
| **TOTAL** | **24,925,200** | **6,930,200** | **9.9%** | **251,400,000** |

Source: Market Statistics, Inc.
U.S. Bureau of the Census
U.S. Immigration and Naturalization Service
Strategy Research Corporation

## TOTAL U.S. AND U.S. HISPANIC POPULATION AND HOUSEHOLDS BY REGIONS AND STATES

## 1991

| | HISPANIC POPULATION | HISPANIC HOUSEHOLDS | PERCENT OF REGION/STATE'S TOTAL POPULATION | TOTAL POPULATION |
|---|---|---|---|---|
| **NORTHEAST** | **3,822,620** | **1,232,740** | **7.4%** | **51,358,800** |
| Connecticut | 177,970 | 53,350 | 5.4 | 3,322,700 |
| Maine | 6,230 | 1,820 | 0.5 | 1,241,200 |
| Massachusetts | 202,140 | 60,200 | 3.3 | 6,081,500 |
| New Hampshire | 8,280 | 2,560 | 0.7 | 1,121,300 |
| New Jersey | 747,850 | 213,630 | 9.6 | 7,813,800 |
| New York | 2,442,700 | 832,190 | 13.4 | 18,185,000 |
| Pennsylvania | 207,170 | 59,190 | 1.7 | 12,010,200 |
| Rhode Island | 25,920 | 8,200 | 2.6 | 1,014,300 |
| Vermont | 4,360 | 1,600 | 0.8 | 568,800 |
| **SOUTHEAST** | **2,338,760** | **770,960** | **2.2%** | **63,644,300** |
| Alabama | 42,120 | 11,600 | 1.0 | 4,084,300 |
| Delaware | 14,460 | 4,100 | 2.1 | 673,400 |
| District Of Columbia | 25,420 | 9,500 | 4.1 | 613,500 |
| Florida | 1,570,300 | 542,060 | 12.0 | 13,077,900 |
| Georgia | 114,760 | 32,500 | 1.8 | 6,548,300 |
| Kentucky | 32,900 | 10,230 | 0.9 | 3,725,200 |
| Louisiana | 118,890 | 40,440 | 2.8 | 4,265,600 |
| Maryland | 90,730 | 24,200 | 1.9 | 4,833,200 |
| Mississippi | 30,910 | 9,180 | 1.2 | 2,601,100 |
| North Carolina | 77,930 | 22,590 | 1.2 | 6,700,300 |
| South Carolina | 44,870 | 13,100 | 1.3 | 3,524,400 |
| Tennessee | 46,360 | 14,050 | 0.9 | 4,929,900 |
| Virginia | 115,150 | 32,400 | 1.8 | 6,254,300 |
| West Virginia | 13,960 | 5,010 | 0.8 | 1,812,900 |
| **CENTRAL** | **2,016,590** | **547,350** | **3.1%** | **65,869,700** |
| Arkansas | 21,930 | 6,800 | 0.9 | 2,376,200 |
| Illinois | 1,096,700 | 283,940 | 9.5 | 11,554,200 |
| Indiana | 109,170 | 29,900 | 1.9 | 5,604,100 |
| Iowa | 30,410 | 9,480 | 1.1 | 2,806,800 |
| Kansas | 86,490 | 21,300 | 3.5 | 2,504,400 |
| Michigan | 205,630 | 55,590 | 2.2 | 9,395,800 |
| Minnesota | 41,130 | 12,450 | 0.9 | 4,422,400 |
| Missouri | 64,810 | 20,070 | 1.2 | 5,172,400 |
| Nebraska | 35,590 | 9,910 | 2.2 | 1,595,500 |
| North Dakota | 4,740 | 1,200 | 0.7 | 645,700 |
| Ohio | 144,570 | 45,000 | 1.3 | 10,964,400 |
| Oklahoma | 81,760 | 23,820 | 2.6 | 3,179,600 |
| South Dakota | 5,180 | 1,450 | 0.7 | 703,500 |
| Wisconsin | 88,[illegible]80 | 26,440 | 1.8 | 4,944,700 |

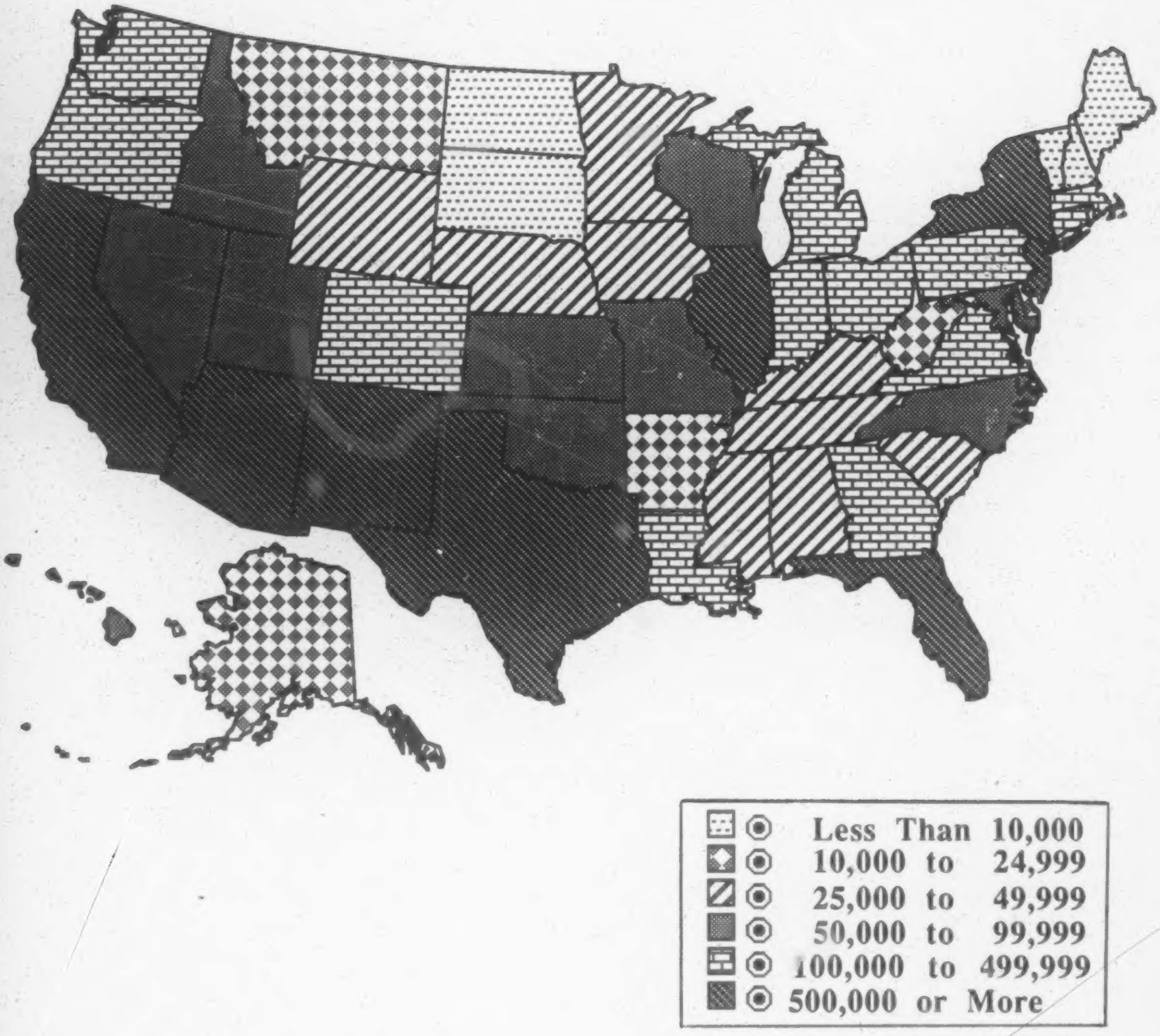
Continued......

# TOTAL U.S. AND U.S. HISPANIC POPULATION AND HOUSEHOLDS BY STATE
## 1991
(Continued)

| | HISPANIC POPULATION | HISPANIC HOUSEHOLDS | PERCENT OF REGION/STATE'S TOTAL POPULATION | TOTAL POPULATION |
|---|---|---|---|---|
| **SOUTHWEST** | **6,655,000** | **1,808,900** | **29.7%** | **22,406,600** |
| Arizona | 872,400 | 240,360 | 23.5 | 3,704,900 |
| New Mexico | 722,800 | 224,610 | 47.2 | 1,531,500 |
| Texas | 5,059,800 | 1,343,930 | 29.5 | 17,170,200 |
| **WEST** | **11,092,230** | **2,570,250** | **23.1%** | **48,120,600** |
| Alaska | 14,460 | 4,110 | 2.6 | 556,000 |
| California | 8,923,200 | 2,259,480 | 29.7 | 30,081,900 |
| Colorado | 473,600 | 120,500 | 14.2 | 3,330,000 |
| Hawaii | 87,490 | 23,260 | 7.8 | 1,120,200 |
| Idaho | 57,330 | 16,380 | 5.6 | 1,017,600 |
| Montana | 12,460 | 3,800 | 1.5 | 807,700 |
| Nevada | 99,700 | 33,740 | 8.2 | 1,214,800 |
| Oregon | 104,700 | 24,930 | 3.6 | 2,873,100 |
| Utah | 86,240 | 23,850 | 5.0 | 1,741,500 |
| Washington | 202,140 | 50,500 | 4.1 | 4,919,300 |
| Wyoming | 30,910 | 9,700 | 6.7 | 458,500 |
| **TOTAL** | **24,925,200** | **6,930,200** | **9.9%** | **251,400,000** |

Source: Market Statistics, Inc.
U.S. Bureau of the Census
U.S. Immigration and Naturalization Service
Strategy Research Corporation

## U.S. Hispanic Population By State : 1991


Less Than 10,000
10,000 to 24,999
25,000 to 49,999
50,000 to 99,999
100,000 to 499,999
500,000 or More

## 4. Hispanic Population Projections

One of the major factors influencing Hispanic population growth in the United States is the population pressures affecting Latin America. These pressures invariably have much to do with the generation of political unrest and economic instability. As shown on the following table, population pressures in Latin America increased dramatically during the past forty years, and are likely to continue. Such unabated growth will only increase the needs and demands of people that are already going unmet. Thus, in turn, the demands placed on the United States by the ongoing Latin American influx are likely to continue in the foreseeable future.

### POPULATION PRESSURE
### IN LATIN AMERICA
### 1950 - 2050

| | Total Population | |
|---|---|---|
| Year | Latin America (Millions) | U.S./Canada (Millions) |
| 1950 | 151.6 | 166.0 |
| 1980 | 348.6 | 227.0 |
| 1990 | 425.4 | 248.2 |
| 2000 | 511.7 | 294.7 |
| 2020 | 672.2 | 325.0 |
| 2050 | 934.0 | 377.0 |

Source: U.S. Bureau of the Census
International Data Base
Strategy Research Corporation

The following table shows U.S. Hispanic population totals for 1980 and 1991, and SRC's projections to the year 2000. The information is presented by regions and sub-regions of the U.S. As indicated, the January 1, 1991 estimated Hispanic population is approximately 24.9 million, as compared with the 1980 census-enumerated total of 14.6 million. SRC estimates that by the year 2000, the total number of Hispanics residing in the U.S. will reach approximately 34.2 million. This will represent a gain of some 9.3 million persons during the balance of this decade, or an average annual increment of just over one million persons. This is very close to the annual rate of growth experienced during the past decade.

The Western and Southern Regions of the country should continue to dominate Hispanic population growth, both in terms of natural increases and immigration. The West should account for approximately **49%** of the anticipated gain, down slightly from the 53% it represented during the 1980's, while the South should increase its proportionate share of the country's Hispanic growth, to approximately 36% of the total, up from the previous decade's 29%. The Northeast and North Central Regions should experience only small incremental changes in their proportionate shares of the country's Hispanic population growth during the nineties.

## HISPANIC POPULATION OF THE UNITED STATES
## 1980-2000

| | | | | CHANGE '80-'91 | | CHANGE '91-'00 | |
|---|---|---|---|---|---|---|---|
| | 1980 (000) | 1991 (000) | 2000 (000) | NUMBER (000) | PERCENT | NUMBER (000) | PERCENT |
| **TOTAL** | **14,603.7** | **24,925.2** | **34,190.5** | **10,321.5** | **70.7%** | **9,265.3** | **37.2%** |
| **REGIONS** | | | | | | | |
| **NORTH-EAST** | **2,608.2** | **3,822.6** | **4,757.6** | **1,214.4** | **46.6** | **935.0** | **24.5** |
| New England | 299.5 | 424.9 | 572.0 | 125.4 | 41.9 | 147.1 | 34.6 |
| Mid-Atlantic | 2,308.7 | 3,397.7 | 4,185.6 | 1,089.0 | 47.2 | 787.9 | 23.2 |
| **NORTH-CENTRAL** | **1,270.0** | **1,912.9** | **2,452.9** | **642.9** | **50.6** | **540.0** | **28.2** |
| East North-Central | 1,061.5 | 1,644.6 | 2,146.3 | 583.1 | 54.9 | 501.7 | 30.5 |
| West North-Central | 208.5 | 268.3 | 306.6 | 59.8 | 28.7 | 38.3 | 14.3 |
| **SOUTH** | **4,468.4** | **7,502.4** | **10,792.6** | **3,034.0** | **67.9** | **3,290.2** | **43.8** |
| South-Atlantic | 1,192.1 | 2,067.7 | 3,237.8 | 875.6 | 73.4 | 1,170.1 | 56.6 |
| East South-Central | 119.2 | 152.3 | 194.3 | 33.1 | 27.8 | 42.0 | 27.6 |
| West South-Central | 3,157.1 | 5,282.4 | 7,360.5 | 2,125.3 | 67.3 | 2,078.1 | 39.3 |
| **WEST** | **6,257.1** | **11,687.3** | **16,187.4** | **5,430.2** | **86.8** | **4,500.1** | **38.5** |
| Mountain | 1,447.9 | 2,355.4 | 3,237.5 | 907.5 | 62.7 | 882.1 | 37.4 |
| Pacific | 4,809.2 | 9,331.9 | 12,949.9 | 4,522.7 | 94.0 | 3,618.0 | 38.8 |

Source: U.S. Bureau of the Census
Strategy Research Corporation

## E. RESULTS OF THE 1990 CENSUS - THE UNDERCOUNT

In mid-1989, Strategy Research Corporation began the research that would lead to its publishing, in October of that year, its estimates for the 1990 U.S. Hispanic population. Given that 1990 was to be a Census year, its was with great anticipation that SRC published its estimates for the top 50 Hispanic ADI's in the country, and then waited for the Census Bureau to make its enumeration and release its information. And we waited. We likened ourselves to those hearty Englishmen digging the "Chunnel", the railroad tunnel beneath the English Channel. There we were, our "digging" complete, and just waiting to see if our counterparts from the Census Bureau, would be matching our projected path or not.

While we were waiting, we conducted a random sample survey throughout the United States, among approximately 5,000 Hispanic heads of household. Among other questions, we asked them if they had received a Census form or whether they had in any way, to their knowledge, been officially counted by the 1990 Census effort. From this national survey, we found that **12.9% of Hispanic households throughout the country were not counted by the 1990 Census!** This clearly evidences the minimum extent of the Census Bureau's undercount of the country's 1990 Hispanic population.

The preliminary results of the Census Bureau's Hispanic population enumerations were released in mid-March, 1991. Currently, the Census reports a total of 22.4 million Hispanics in the U.S. However, as noted above, given the results of the nationwide survey conducted by Strategy Research, **the Census results represent an undercount of the U.S. Hispanic population of 12.9%**. By adding the 12.9% "uncounted" Hispanics to the Hispanics the Census did count, we can quantify the Bureau's undercount of the 1990 U.S. Hispanic population.

As shown on the following table, the undercount represents a total of approximately 2.9 million Hispanics. The addition of this likely undercount to the preliminary Census findings would bring the adjusted total Hispanic population for 1990 to approximately 25.3 million. As noted, Strategy Research's January 1, 1990 Hispanic population estimate was 24.3 million, indicating that SRC also undercounted the 1990 U.S. Hispanic population. **In April 1991, the Census Bureau announced that the results of its follow-up postcard survey of some 60,000 U.S. Hispanic households indicated an undercount of at least 6%, causing the Bureau to adjust its preliminary Hispanic population total to 24.1 million**. This is only 200,000 or 0.8% less than SRC's 1990 estimate.

We have reviewed a substantial amount of information concerning the Census Bureau's methodologies in enumerating the Hispanic population and other ethnic groups for the 1990 Census. We have presented some of these findings in the Appendix to this report, as well as a number of articles collected from newspapers around the country concerning the Census and fears and complaints of undercounts.

## TOTAL HISPANIC POPULATION U.S. CENSUS BUREAU AND STRATEGY RESEARCH CORPORATION

## 1990

| | |
|---|---|
| Preliminary Census Hispanic Population | 22,354,059 |
| Strategy Research Hispanic Population Estimate | 24,293,400 |
| SRC 1990 Hispanic Population Undercount | 12.9% |
| Preliminary Census Hispanic Population Plus SRC ndercount | 25,237,700 |
| Census Postcard Adjustment | 6.0% |
| Census Adjustment | 24,100,000 |

Source: U.S. Census Bureau
Market Statistics, Inc.
U.S. Immigration and Naturalization Service
Strategy Research Corporation

## F. STRATEGY RESEARCH AND CENSUS COMPARISONS

For the past 200 years, the Census has been the standard measure of the American population. The accuracy of the Census is most important because it becomes the basis for legislative reapportionment and redistricting, provides political leverage for both local and statewide government agencies, and is critical in distributing federal funds.

In both 1970 and 1980 there was a great deal of controversy as to the accuracy of the Hispanic count by the Census Bureau's enumerations. The concern was that a serious undercounting of the Hispanic population had occurred due largely in part to language barriers, unstable housing, and fear of government agents among the increasing influx of undocumented aliens who attempt to avoid enumerators.

A proper counting of Hispanics in the U.S. is essential. Politically, it would afford communities their fair share of federal dollars to support programs of primary interest to Hispanics. Economically, it provides a sound basis for corporate America to include Hispanics in their marketing strategies.

To this end, the Bureau of the Census, public and private organizations, businesses, churches, and scores of volunteers made a concerted effort to improve the enumeration of Hispanics in 1990. Promotions, mailings, air time, were all directed to Hispanics in hopes that they would respond. **Although all questionnaires mailed were in English**, a toll free number was provided for Hispanics to request Spanish-language census forms.

As previously discussed, in order to determine the level of accuracy that the Census Bureau was able to accomplish in counting Hispanics in 1990, Strategy Research included questions in its **1991 U.S. HISPANIC MARKET STUDY** survey that addressed this issue. Responses to these questions indicated that **12.9% of all Hispanics interviewed did not complete and/or return a Census questionnaire**. This includes those (the vast majority) who reported never receiving a Census form or questionnaire in the first place. Interestingly, those not returning a questionnaire were more likely to be young (18 to 34 years) and female. A large number of those persons not counted by the Census may well be undocumented or illegal immigrants.

What we can conclude from the survey results is that all the extra effort utilized by the Census and other factions did, indeed, improve participation among Hispanics. The Census Bureau's preliminary estimate of the U.S. Hispanic population is 22.4 million. Strategy Research's estimate for 1990 was 24.3 million. Based on this, the average 12.9% non-response means the Census may have **undercounted Hispanics by approximately three million persons,** a number equivalent to the total population of an Atlanta, a Boston or a Dallas. SRC may have also understated the U.S. Hispanic population, by as much as one million persons.

**Overall, the 1990 Census count validates the 1990 Hispanic population estimates made by SRC in most areas of the country.** It is significant to note that the Census enumerations and SRC's estimates were consistently similar in the major Hispanic markets of the country, but differed in border areas, and in rural or non-metropolitan sections of the country. It is no accident that it is in these very areas (border and rural) that illegals first arrive and are then drawn to in order to avoid detection and achieve anonymity. Thus, whatever additional steps the Census Bureau took in conducting the 1990 Census, those steps worked well in some areas, such as major urban centers, and only worked partially in other sections of the country, such as border areas and rural or non-metropolitan regions.

To illustrate the similarities and differences among the distinct types of Hispanic markets, we have prepared a number of tables that compare the findings of the Census with Strategy Research Corporation's population estimates, made one-and-one-half years (18 months) prior to publication of the preliminary Census counts. The following table shows the preliminary Census counts and Strategy Research estimates for the Hispanic population of the top three Hispanic ADI's of the country, Los Angeles, New York and Miami.

### HISPANIC POPULATION FOR TOP THREE HISPANIC ADI'S STRATEGY RESEARCH AND U.S. CENSUS BUREAU 1990

| ADI | SRC TOTAL (000) | CENSUS TOTAL (000) | PERCENT DIFFERENCE |
|---|---|---|---|
| LOS ANGELES | 4,812.6 | 4,740.2 | 1.5% |
| NEW YORK | 2,894.8 | 2,798.7 | 3.4 |
| MIAMI | 1,057.2 | 1,071.0 | -1.3 |
| **TOTAL TOP THREE HISPANIC ADI'S** | **8,764.6** | **8,609.9** | **1.8%** |

Note: SRC estimates are as of 1/1/90;
Census enumerations are as of 4/1/90

Source: U.S. Census Bureau
Market Statistics, Inc.
Strategy Research Corporation

As shown on the foregoing table, **SRC had estimated the combined populations of these three markets for January 1, 1990, at 8.7 million. The Bureau's preliminary count of Hispanic population for the three ADI's was 8.6 million! The difference was a mere 1.8%.** Moreover, the difference for the Los Angeles population was only 1.5%, and for Miami, SRC was just 1.3% under the Census count. Considering that SRC's estimate is for January 1, 1990, three months prior to the April 1, 1990 Census enumerations, and considering the continuing population growth of the Miami Area, the 100,000 difference between the Census numbers and SRC's estimate can be considered the same. It is important to reiterate that these three markets combined, account for approximately 37% of the entire U.S. Hispanic population.

The next table shows a comparison between Strategy's estimates and the preliminary Census enumerations for the Hispanic populations of the top twenty Hispanic markets, seven of which are border markets. The data clearly reveals that SRC's estimates and the Census enumerations for the twelve major markets were remarkably close, with the Census validating SRC's estimates.

**SRC's estimate for the combined twelve ADI's was 13.9 million; the preliminary Census count for these same ADI's was 13.7 million, a difference of but 1.7%.** Clearly, in these major urban markets, there was little undercount, by either the Census Bureau count or Strategy Research's estimate.

However, the comparisons for the border markets, for the most part tell a different story. As indicated, with the exception of San Diego, the only major California border market, there were considerable differences between the Census numbers and the estimates of Strategy Research. Other than San Diego, where there was only a difference of 0.3%, all the border market differences were over 15%, the average difference for the six remaining areas being 18.8%. These differences evidence the Census Bureau's large undercount of the Hispanic population that occurred in these markets, and in other rural or non-metropolitan areas of the country. These circumstances (the undercount) may have occurred in those areas because of insufficient numbers of enumerators, combined with the circumstance of large numbers of undocumented new arrivals of Hispanic origin.

## HISPANIC POPULATION FOR TOP TWENTY HISPANIC ADI'S STRATEGY RESEARCH AND U.S. CENSUS BUREAU 1990

| ADI | SRC TOTAL (000) | CENSUS TOTAL (000) | PERCENT DIFFERENCE |
|---|---|---|---|
| **MAJOR METRO ADI'S** | | | |
| LOS ANGELES | 4,812.6 | 4,740.2 | 1.5% |
| NEW YORK | 2,894.8 | 2,798.7 | 3.4 |
| MIAMI | 1,057.2 | 1,071.0 | -1.3 |
| SAN FRANCISCO | 940.7 | 908.1 | 3.6 |
| CHICAGO | 936.5 | 899.0 | 4.2 |
| HOUSTON | 844.5 | 819.0 | 3.1 |
| FRESNO | 527.3 | 481.3 | 9.6 |
| DALLAS-FT. WORTH | 515.7 | 558.1 | -7.6 |
| PHOENIX | 437.5 | 425.0 | 2.9 |
| SACRAMENTO | 422.8 | 425.8 | -0.7 |
| DENVER | 304.7 | 296.0 | 2.9 |
| PHILADELPHIA | 258.8 | 291.6 | -11.2 |
| **SUB-TOTAL** | **13,953.1** | **13,713.8** | **1.7%** |
| **BORDER METRO ADI'S** | | | |
| TEXAS/SOUTHWEST | | | |
| SAN ANTONIO | 983.9 | 799.0 | 23.1% |
| MCALLEN/BRNSVILLE | 684.9 | 594.3 | 15.2 |
| ALBUQUERQUE | 600.5 | 482.6 | 24.4 |
| EL PASO | 567.9 | 492.3 | 15.4 |
| CORPUS CHRISTI | 399.1 | 274.3 | 45.5 |
| TUCSON | 258.0 | 217.8 | 18.4 |
| AUSTIN | 219.9 | 186.7 | 17.8 |
| BORDER CALIFORNIA | | | |
| SAN DIEGO | 512.4 | 510.8 | 0.3 |
| **SUB-TOTAL** | **4,226.6** | **3,557.8** | **18.8%** |
| **TOTAL TOP TWENTY HISPANIC ADI'S** | **18,179.7** | **17,271.6** | **5.2%** |
| **TOTAL TOP FIFTY HISPANIC ADI'S** | **21,257.2** | **20,506.0** | **3.7%** |
| **TOTAL U.S. HISPANIC** | **24,293.4** | **22,354.1** | **8.7%** |

Note: SRC estimates are as of 1/1/90;
Census enumerations are as of 4/1/90

Source: U.S. Census Bureau
Market Statistics, Inc.
Strategy Research Corporation

# III

# IMMIGRATION TO THE UNITED STATES

# III. IMMIGRATION TO THE UNITED STATES

## A. HISTORICAL PERSPECTIVE

Beginning with the colonization of the "New World" by Spanish, English and French, and through the American Revolution, the Louisiana Purchase and the Texas independence, the pattern of immigration to the United States has changed in many ways. During the Nineteenth and early Twentieth centuries, the migrations of persons to the Western Hemisphere and to the United States, in particular, was composed of individuals and family groups, whereas the population transfers occurring between, during and immediately after the two world wars were often composed of entire communities. The earlier movements reflected the free and voluntary choice of individuals, motivated by economic needs and considerations, while the war-induced migrations reflected motivation by fear and force. Unfortunately, much of the migrations of the current and most recent decades (1980's in particular), have also been motivated by fear and force.

### 1. Population Growth 1790-1850

Although the Country's first Census was conducted in 1790, it wasn't until 1820 that immigration statistics were recorded by the Census. The Country's population in 1790 was estimated at 3.9 million. The population grew to about 9.6 million by 1820. The following table presents a record of the number of legal or documented immigrants present in the U.S. population and the number entering the U.S. between 1790 and 1850.

**U.S. POPULATION AND LEGAL IMMIGRATION**
**1790 - 1850**

| AS OF: | TOTAL POPULATION | POPULATION INCREASE | CHANGE IN NUMBER OF IMMIGRANTS | IMMIGRANTS AS % OF TOTAL INCREASE |
|---|---|---|---|---|
| 1790 | 3,930,000 | — | * | — |
| 1820 | 9,640,000 | 5,710,000 | * | — |
| 1840 | 17,069,450 | 7,429,450 | 744,595 | 10.0% |
| 1850 | 23,190,000 | 6,120,550 | 1,719,606 | 28.1 |
| 1790 - 1850 | — | 19,260,000 | 2,464,201 | 12.8% |

* Records not kept until 1820

Source: U.S. Bureau of the Census
U.S. Immigration and Naturalization Service
Strategy Research Corporation

As shown in the previous table, immigration to the United States accounted for less than one million new residents in 1840, but then increased dramatically during the next ten years when approximately 1.7 million people arrived at this country's shores. While accounting for only 10% of the Nation's population increment during the preceding twenty years, immigration jumped to represent just over 28% of the new population during the next ten-year period.

## 2. Population Growth 1850 - 1900

As shown on the following table, legal immigration numbers continued to grow significantly during the last half of the Nineteenth Century. Between 1850 and 1900, the population of the country tripled, increasing from 23 million in 1850 to 76 million by the start of the new century. About one-third of this growth was accounted for by immigration, better than two-thirds of which originated in Europe.

### U.S. POPULATION AND LEGAL IMMIGRATION
### 1850 - 1900

| AS OF: | TOTAL POPULATION | POPULATION INCREASE | NUMBER OF IMMIGRANTS | IMMIGRANTS AS PERCENT OF TOTAL INCREASE |
|---|---|---|---|---|
| 1850 | 23,190,000 | — | — | — |
| 1900 | 75,955,000 | 52,765,000 | 16,659,405 | 31.5% |

Source: U.S. Bureau of the Census
U.S. Immigration and Naturalization Service
Strategy Research Corporation

## 3. Population Growth 1900 - 1990

The first 20 years of the 20th Century brought nearly as many immigrants to the U.S. as had arrived during the last half of the 19th Century. As shown on the following table, immigration accounted for close to one-half (49%) of the total increase in population between 1900 and 1920. The immigration slowed during the next thirty years. Only 13% of the total population increase between 1920 and 1950 was attributable to immigration. This trend, however, reversed beginning with 1950. After a slight percentage decline between 1950 and 1970, immigrants as a percentage of total U.S. population growth accelerated. Approximately 28% of the total population increase was due to immigration between 1980 and 1990, as compared to approximately 14% between 1950 and 1980.

### U.S. POPULATION AND LEGAL IMMIGRATION
### 1900 - 1990

| AS OF: | TOTAL POPULATION | POPULATION INCREASE | NUMBER OF IMMIGRANTS* | IMMIGRANTS AS % OF TOTAL INCREASE |
|---|---|---|---|---|
| 1900 | 75,955,000 | — | — | — |
| 1920 | 105,710,600 | 29,755,600 | 14,531,197 | 48.9% |
| 1950 | 150,697,000 | 44,985,400 | 5,670,678 | 12.6 |
| 1970 | 203,235,300 | 52,538,300 | 5,837,156 | 11.1 |
| 1980 | 226,545,805 | 23,310,505 | 4,493,334 | 19.3 |
| 1950 - 1980 | — | 75,848,805 | 10,330,490 | 13.6% |
| 1990 | 249,632,700 | 23,086,895 | 6,487,417 | 28.1 |

* Previous period shown.

Source: U.S. Bureau of the Census
U.S. Immigration and Naturalization Service
Strategy Research Corporation

## B. COUNTRY OF ORIGIN

The mix of immigrants by country of origin has significantly changed since 1950. During the 1950's, Europeans continued to be the dominant part (over 52%) of total immigration. Their proportion gradually declined to 34% in the 1960's, to 18% in the 1970's, and to 10% in the 1980's. The drop in Canadian immigrants was equally dramatic.

The decline in European and Canadian immigrants was associated with significant increases in Latin American and Asian immigrants. The proportion of Latin American immigration increased from 21% in the 1950's to approximately 34% in 1960's, and has remained at that percentage level through the ensuing two decades. The proportion of Asian immigrants on the other hand, has gradually grown from 6% in the 1950's to over 42% in the last decade.

For the 1950 to 1989 period as a whole, the greatest number of immigrants came from Latin America (32% of the total), followed by Asia (29%) and Europe (24%). This is based solely on documented immigrants. If undocumented immigrants which are predominantly Latin American were to be added, their proportion would far exceed any other group.

Within the Latin American group, Mexico remained the top country of origin, accounting for almost one-half of all Latin American immigration since 1950. Immigration from Cuba during the 1980's dropped to one-third the level of the previous two decades, while immigration from the Dominican Republic grew to 4%, from less than 1% in the 1950's.

It is interesting to note that legal immigration from Mexico (the top country of origin among Hispanic immigrants) has been recorded by the Immigration and Naturalization Service since 1821. There has been no such significant continuous documented immigration among any other Hispanic group. The majority of immigration from Puerto Rico, Cuba and Central and South America has occurred only since 1950.

The following table shows the distribution of legal immigration by country during the period 1820 to 1900. Germany had the largest percentage (26%) followed by Ireland and Great Britain (at 20% and 16% respectively).

## DISTRIBUTION OF LEGAL U.S. IMMIGRATION BY COUNTRY OF ORIGIN

### 1820 - 1900

| COUNTRY | PERCENT |
|---|---|
| Germany | 26.3% |
| Ireland | 20.3 |
| Great Britain | 15.8 |
| Scandinavian | 7.5 |
| Italy | 5.4 |
| USSR | 4.0 |
| Balance of Europe | 11.1 |
| Sub Total | 90.4% |
| Latin America and Caribbean | 0.9 |
| Canada | 5.5 |
| Asia | 2.0 |
| Australia/New Zealand | 0.1 |
| Africa | * |
| Sub Total Others | 8.5 |
| All Other Countries | 1.1 |
| TOTAL | 100.0% |

*Less than 0.1%

Source: U.S. Census Bureau
Strategy Research Corporation

While the numbers of new residents arriving increased dramatically during the first two decades of this century there was also an equally dramatic shift in the composition of the newly immigrating population. The most evident change occurred among European immigrants. Earlier dominated by German, Irish and English immigrants (62% of all immigrants between 1820 and 1900), the early 20th Century immigrants (from 1900 to 1950) were led by persons from Italy (19%), Hungary (16%) and the U.S.S.R. (13%). Germany, Ireland and Great Britain accounted for only 17% of the total newcomers during this period.

## LEGAL IMMIGRATION BY MAJOR COUNTRIES AND AREAS

### 1820 - 1950

| | 1820 - 1900 | | 1901 - 1950 | |
|---|---|---|---|---|
| COUNTRY | NUMBER | PERCENT | NUMBER | PERCENT |
| Total Europe | 17,280,089 | 90.4% | 15,809,797 | 78.4% |
| Latin America | 42,281 | 0.2 | 1,039,847 | 5.2 |
| Caribbean (Non-Spanish) | 125,598 | 0.7 | 371,098 | 1.8 |
| Canada | 1,051,275 | 5.5 | 2,126,171 | 10.5 |
| Asia | 375,493 | 2.0 | 731,279 | 3.6 |
| Australia/New Zealand | 27,489 | 0.1 | 57,430 | 0.3 |
| Africa | 2,213 | * | 31,214 | 0.2 |
| All Others | 219,168 | 1.1 | 5,040 | 0.0 |
| **TOTAL** | **19,123,606** | **100.0%** | **20,171,876** | **100.0%** |

* Less than 0.1%

Note: Because of changes in boundaries and changes in lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Bureau of the Census
U.S. Immigration and Naturalization Service
Strategy Research Corporation

The following table presents a summary of documented U.S. immigration by major countries and regions for the period 1951 to 1989. During this time, Latin American and Asian immigrations showed the largest increase.

### DOCUMENTED U.S. IMMIGRATION BY MAJOR COUNTRIES AND REGIONS

### 1951 - 1989

| | 1951 - 1960 | | 1961 - 1970 | | 1971 - 1980 | | 1981 - 1989 | |
|---|---|---|---|---|---|---|---|---|
| | Number (000) | Percent | Number (000) | Percent | Number (000) | Percent | Number (000) | Percent |
| **EUROPE** | 1,295.6 | 52.1% | 1,123.4 | 33.8% | 800.4 | 18.0% | 588.2 | 10.1% |
| **NORTH AMERICA** | 472.1 | 19.0 | 600.6 | 18.0 | 495.3 | 11.0 | 404.1 | 7.0 |
| **LATIN AMERICA** | 524.9 | 21.1 | 1,115.8 | 33.7 | 1,487.3 | 32.8 | 2,015.1 | 34.7 |
| **ASIA** | 150.1 | 6.1 | 427.8 | 12.9 | 1,588.2 | 35.4 | 2,478.8 | 42.8 |
| **AUSTRALIA** | 16.2 | 0.6 | 21.3 | 0.6 | 25.6 | 0.6 | 12.1 | 0.2 |
| **AFRICA** | 14.1 | 0.6 | 29.0 | 0.9 | 80.8 | 1.8 | 156.3 | 2.7 |
| **ALL OTHER COUNTRIES** | 12.5 | 0.5 | 3.9 | 0.1 | 15.9 | 0.4 | 146.9 | 2.5 |
| **TOTAL ALL COUNTRIES** | 2,485.5 | 100.0% | 3,321.8 | 100.0% | 4,493.5 | 100.0% | 5,801.5 | 100.0% |

Notes: Because of changes in boundaries and lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

The following table reports on documented Latin American and Spanish immigration to the United States between 1951 and 1989. Documented immigration from Mexico has always dominated legal Hispanic immigration. Forty-four percent of all documented Hispanic immigration to the U.S. between 1951 and 1989 was accounted for by Mexicans. This represented a total of close to 2.4 million people during the 38-year period.

### DOCUMENTED LATIN AMERICAN AND SPANISH IMMIGRATION BY COUNTRY OR REGION OF LAST RESIDENCE
### 1951 - 1989

| | 1951 - 1960 | | 1961 - 1970 | | 1971 - 1980 | | 1981 - 1989 | |
|---|---|---|---|---|---|---|---|---|
| | Number (000) | Percent | Number (000) | Percent | Number (000) | Percent | Number (000) | Percent |
| Mexico | 299.8 | 50.6% | 453.9 | 38.5% | 640.3 | 41.9% | 974.2 | 48.1% |
| Cuba | 78.9 | 13.3 | 208.5 | 17.7 | 268.6 | 17.5 | 148.6 | 7.3 |
| Dominican Republic | 9.8 | 1.7 | 94.1 | 8.0 | 148.0 | 9.7 | 209.6 | 10.3 |
| Argentina | 19.5 | 3.3 | 49.7 | 4.2 | 29.9 | 2.0 | 20.3 | 1.0 |
| Brazil | 13.8 | 2.3 | 29.3 | 2.5 | 17.8 | 1.2 | 19.6 | 1.0 |
| Colombia | 18.0 | 3.0 | 72.0 | 6.1 | 77.3 | 5.1 | 100.2 | 4.9 |
| Ecuador | 9.9 | 1.7 | 36.8 | 3.1 | 50.1 | 3.3 | 43.6 | 2.1 |
| Peru | 7.4 | 1.2 | 19.1 | 1.6 | 29.2 | 1.9 | 48.7 | 2.4 |
| El Salvador | 5.9 | 1.0 | 15.0 | 1.3 | 34.4 | 2.3 | 134.4 | 6.6 |
| Guatemala | 4.7 | 0.8 | 15.9 | 1.3 | 25.9 | 1.7 | 55.6 | 2.7 |
| Panama | 11.7 | 2.0 | 19.4 | 1.6 | 23.5 | 1.5 | 25.6 | 1.3 |
| Other Central America | 22.5 | 3.8 | 51.1 | 4.3 | 50.8 | 3.3 | 96.9 | 4.8 |
| Other South America | 82.8 | 14.0 | 70.7 | 6.0 | 92.2 | 6.0 | 137.8 | 6.8 |
| Spain | 7.9 | 1.3 | 44.7 | 3.8 | 39.1 | 2.6 | 13.8 | 0.7 |
| TOTAL | 592.6 | 100.0% | 1,180.2 | 100.0% | 1,527.1 | 100.0% | 2,028.9 | 100.0% |

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

Mexican immigration continues to be the single most dominant segment of the total Hispanic immigration. The other two countries with substantial increase in immigration numbers are the Dominican Republic and El Salvador. The following table presents more detailed information for the national origin of documented Hispanic immigrants to the United States during the 1980's.

### DOCUMENTED LATIN AMERICAN AND SPANISH IMMIGRATION BY COUNTRY OR REGION OF LAST RESIDENCE

### 1981 - 1989

| Country | 1981 - 1986 |  | 1987 |  | 1988 |  | 1989 |  | 1981 - 1989 |  |
|---|---|---|---|---|---|---|---|---|---|---|
|  | Number (000) | Percent | Number (000) | Percent | Number (000) | Percent | Number (000) | Percent | Number (000) | Percent |
| Mexico | 401.6 | 39.9% | 72.4 | 36.0% | 95.0 | 44.6% | 405.2 | 67.0% | 974.2 | 48.1% |
| Cuba | 92.1 | 9.1 | 28.9 | 14.4 | 17.6 | 8.2 | 10.0 | 1.7 | 148.6 | 7.3 |
| Dominican Republic | 130.9 | 12.9 | 24.9 | 12.4 | 27.2 | 12.8 | 26.7 | 4.4 | 209.6 | 10.3 |
| Argentina | 12.5 | 1.2 | 2.1 | 1.0 | 2.4 | 1.1 | 3.3 | 0.5 | 20.3 | 1.0 |
| Brazil | 11.0 | 1.1 | 2.1 | 1.2 | 2.7 | 1.3 | 3.3 | 0.6 | 19.6 | 1.0 |
| Columbia | 63.0 | 6.3 | 11.7 | 5.9 | 10.3 | 4.8 | 15.2 | 2.5 | 100.2 | 4.9 |
| Ecuador | 26.7 | 2.6 | 4.6 | 2.3 | 4.7 | 2.2 | 7.5 | 1.2 | 43.6 | 2.1 |
| Peru | 26.6 | 2.6 | 5.9 | 2.9 | 5.9 | 2.8 | 10.2 | 1.7 | 48.7 | 2.4 |
| El Salvador | 53.8 | 5.3 | 10.7 | 5.3 | 12.0 | 5.6 | 57.9 | 9.6 | 134.4 | 6.6 |
| Guatemala | 25.1 | 2.5 | 5.7 | 2.8 | 5.7 | 2.7 | 19.0 | 3.2 | 55.6 | 2.7 |
| Nicaragua | 17.1 | 1.7 | 3.3 | 1.6 | 3.3 | 1.6 | 8.8 | 1.5 | 32.6 | 1.6 |
| Panama | 17.6 | 1.7 | 2.1 | 1.0 | 2.5 | 1.2 | 3.5 | 0.6 | 25.6 | 1.3 |
| Other Central America | 37.9 | 3.7 | 7.5 | 3.7 | 7.2 | 3.4 | 11.8 | 2.0 | 64.3 | 3.2 |
| Other South America | 86.0 | 8.5 | 17.5 | 8.7 | 15.0 | 7.0 | 19.4 | 3.2 | 137.8 | 6.8 |
| Spain | 9.1 | 0.9 | 1.6 | 0.8 | 1.5 | 0.7 | 1.6 | 0.3 | 13.8 | 0.7 |
| TOTAL | 1,011.0 | 100.0% | 201.0 | 100.0% | 213.0 | 100.0% | 603.4 | 100.0% | 2,028.9 | 100.0% |

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

The following table depicts the numbers of documented Mexicans entering the United States since 1821.

## LEGAL MEXICAN IMMIGRATION TO THE UNITED STATES
## 1821-1989

| PERIOD | NUMBER OF IMMIGRANTS | PERCENT OF PERIOD'S TOTAL IMMIGRANTS |
|---|---|---|
| 1821 - 1850 | 14,687 | 0.6% |
| 1851 - 1900* | 13,315 | 0.1 |
| 1901 - 1910 | 49,642 | 0.6 |
| 1911 - 1920 | 219,004 | 3.8 |
| 1921 - 1930 | 459,287 | 11.2 |
| 1931 - 1940 | 22,319 | 4.2 |
| 1941 - 1950 | 60,589 | 5.8 |
| 1951 - 1960 | 299,811 | 11.9 |
| 1961 - 1970 | 453,934 | 13.7 |
| 1971 - 1980 | 640,294 | 14.2 |
| 1981 | 101,268 | 17.0 |
| 1982 | 56,106 | 9.4 |
| 1983 | 59,079 | 10.6 |
| 1984 | 57,557 | 10.6 |
| 1985 | 61,077 | 10.7 |
| 1986 | 66,533 | 11.1 |
| 1987 | 72,351 | 12.0 |
| 1988 | 95,039 | 14.8 |
| 1989** | 405,172 | 37.1 |
| 1981 - 1989 | 974,182 | 16.8% |

* No record of immigration from Mexico from 1886 to 1893.
** Includes immigrants admitted under IRC Act of 1986.

Source: U.S. Immigration and Naturalization Service
Strategy Research Corporation

## C. CURRENT IMMIGRATION PATTERNS AND TRENDS

The composition of immigration to the United States has shifted dramatically from one dominated by Europeans (prior to 1950), to one involving increasing numbers of Hispanics and Asians. The country's Hispanic population has been the one ethnic group most significantly effected by changing immigration patterns. Political and economic pressures and instability throughout the Caribbean and Central and South America have fueled growing unrest, increased poverty, and a desire for a better quality of life.

The largest and most steadily increasing movement of Hispanic persons into the United States has been from Mexico. The Bureau of Census estimated that the nation's Hispanic population grew by about 5.2 million, or 34%, in the first eight years of the 1980's, about one-half from immigration and one-half from natural increases.

Although they are impossible to verify, hundreds of thousands of undocumented aliens enter and stay in the United States every year and have been doing so ever since the Country's first borders were put in place. Again, although there are no verifiable figures available, Hispanics also clearly dominate the flow of illegal immigrants into the country.

### 1. Documented Immigration Trends and Patterns: 1951 - 1989

Until 1950, Europeans accounted for better than one-half of all legal immigration. However, during the 1950's and 1960's, Latin American immigration more than doubled the previous decade's totals, while European immigration substantially declined. Beginning with 1970, both groups were overshadowed by a phenomenal increase generated by Asians, whose numbers increased from under one-half million in the 1960's, to better than 1.5 million during the 1970's.

During the 1980 Decade, legal Latin American immigration continued strong, accounting for better than two million people. This represents an average annual increase of some 50% over the average annual growth rate recorded by documented Latin American immigration during the previous decade. Legal immigration from Asia, though, continued to dominate U.S. immigration during the 1980's. Nearly 43% of all immigrants legally entering the U.S. since 1981 have been Asians, numbering some 2.5 million. This represents a 75% increase in the average annual growth rate for Asian immigration recorded during the 1970's.

A total of nearly 1.1 million aliens were granted legal permanent resident status in the United States during fiscal year 1989, the last full year for which such information is available. A total of 492,200 aliens were legalized under the provisions of the Immigration Reform and Control Act (IRCA) of 1986. The total number of immigrants admitted in 1989, excluding legalization was 598,724, an increase of 4% over the comparable number in 1988. Aliens granted permanent residence under the legalization provisions of IRCA must have lived in the United States prior 1982; therefore, they are not new residents of the United States. The typical legalized immigrant has lived in the United States for ten years.

The characteristics of the IRCA legalization immigrants are considerably different from other immigrants admitted to the U.S. in 1989. Legalized immigrants are more likely to be Hispanic (87% versus 26%) and to live in states bordering Mexico (75% versus 36%). Almost two out of five legalized immigrants granted permanent residence in 1989 lived in the Los Angeles-Long Beach, California metropolitan area.

## 2. Countries of Birth

Mexico was the leading source country for both legalized and non-legalized immigrants, with an overall total of 405,172. Mexicans accounted for 71% of the legalized immigrants and 10% of the other immigrants admitted in 1989. Following, were El Salvador (57,878), the Philippines (57,034), Vietnam (37,739), Korea (34,222), and Mainland China (32,272). Three of four El Salvadoran immigrants were admitted under the legalization provisions (77%). The leading countries for legalized immigrants following Mexico and El Salvador were Colombia (13,548), the Philippines (7,499), Poland (5,505), and Haiti (5,325) (Colombia, Poland, and Haiti are included in the "other" category on the following table).

## TOTAL IMMIGRANTS FOR TOP TEN COUNTRIES OF BIRTH 1989

| Country of Birth | Total | | Non-legalization | | IRCA legalization | |
|---|---|---|---|---|---|---|
| | Number | Percent | Number | Percent | Number | Percent |
| Total | 1,090,924 | 100.0% | 598,724 | 100.0% | 492,200 | 100.0% |
| 1 Mexico | 405,172 | 37.2 | 58,443 | 9.8 | 346,729 | 70.5 |
| 2 El Salvador | 57,878 | 5.3 | 13,451 | 2.2 | 44,427 | 9.0 |
| 3 Philippines | 57,034 | 5.2 | 49,535 | 8.3 | 7,499 | 1.5 |
| 4 Vietnam | 37,739 | 3.5 | 37,571 | 6.3 | 168 | 0.0 |
| 5 Korea | 34,222 | 3.1 | 32,204 | 5.4 | 2,018 | 0.4 |
| 6 China, Mainland | 32,272 | 3.0 | 27,394 | 4.6 | 4,878 | 1.0 |
| 7 India | 31,175 | 2.9 | 28,498 | 4.8 | 2,677 | 0.6 |
| 8 Dominican Republic | 26,723 | 2.4 | 25,553 | 4.3 | 1,170 | 0.2 |
| 9 Jamaica | 24,523 | 2.2 | 21,899 | 3.7 | 2,624 | 0.5 |
| 10 Iran | 21,243 | 1.9 | 17,128 | 2.9 | 4,115 | 0.9 |
| Other | 362,943 | 33.3 | 287,048 | 47.7 | 75,895 | 15.4 |

Source: U.S. Immigration and Naturalization Service
Strategy Research Corporation

The following table summarizes documented immigration characteristics during the 19th Century, the first half of the 20th Century and from 1951 to 1989. The declining effect of European migration is very evident in this table as are the increasing effects of Latin American and Asian immigrations. For the 37-year period, 1951 to 1989, Latin Americans accounted for 32% of all documented immigration, followed by Asians at 29%, and Europeans at approximately 24%.

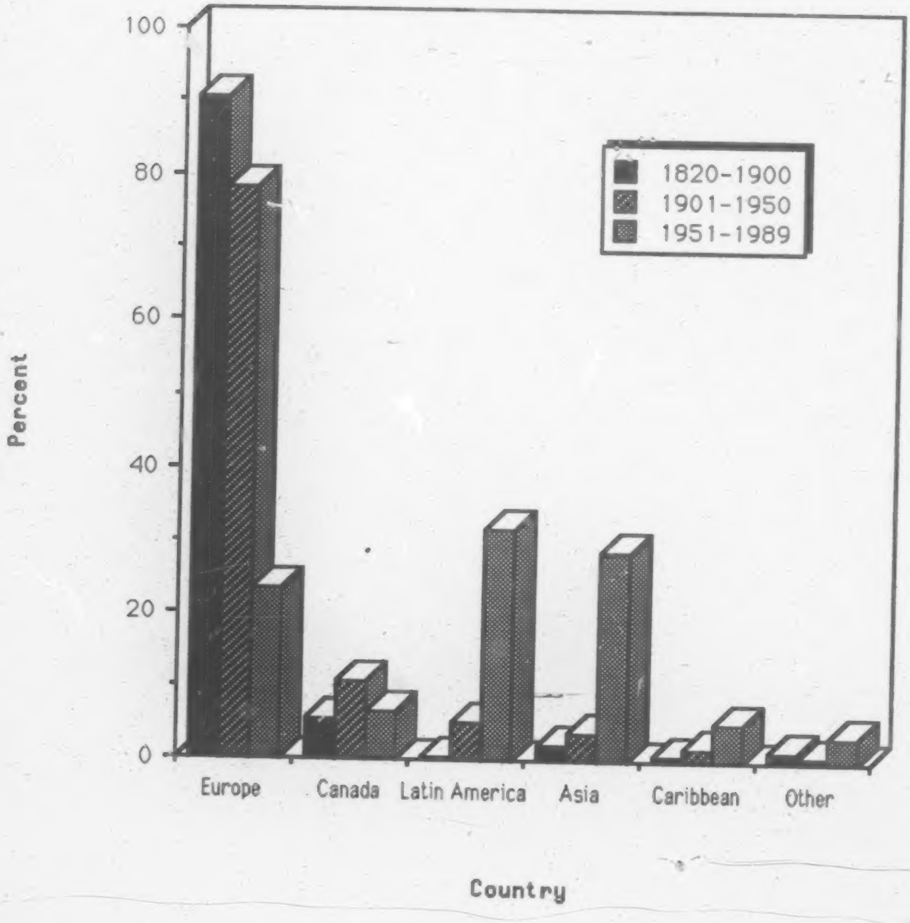
### DOCUMENTED IMMIGRATION BY MAJOR COUNTRIES AND AREAS
### 1820-1987

| | 1820 - 1900 | | 1901 - 1950 | | 1951 - 1989 | | 1820 - 1989 | |
|---|---|---|---|---|---|---|---|---|
| | Number (000) | Percent | Number (000) | Percent | Number (000) | Percent | Number (000) | Percent |
| Europe | 17,280.1 | 90.4% | 15,809.8 | 78.2% | 3,807.6 | 23.8% | 36,897.5 | 66.6% |
| Latin America | 42.3 | 0.2 | 1,039.8 | 5.2 | 5,143.1 | 32.1 | 6,225.2 | 11.2 |
| Caribbean (Non-Spanish) | 125.6 | 0.7 | 371.1 | 1.8 | 827.3 | 5.2 | 1,324.0 | 2.4 |
| Canada | 1,051.3 | 5.5 | 2,126.2 | 10.5 | 1,063.6 | 6.6 | 4,241.0 | 7.7 |
| Asia | 375.5 | 2.0 | 731.3 | 3.6 | 4,644.9 | 28.9 | 5,751.7 | 10.4 |
| Australia/New Zealand | 27.5 | 0.1 | 57.4 | 0.3 | 75.2 | 0.5 | 160.1 | 0.3 |
| Africa | 2.2 | 0.0 | 31.2 | 0.2 | 280.2 | 1.8 | 313.6 | 0.6 |
| All Other Countries | 219.2 | 1.1 | 35.0 | 0.2 | 179.2 | 1.1 | 433.4 | 0.8 |
| TOTAL | 19,123.7 | 100.0% | 20,201.8 | 100.0% | 16,021.1 | 100.0% | 55,346.5 | 100.0% |

Note: Because of changes in boundaries and changes in lists of countries, data for certain countries are not comparable throughout.

Source: U.S. Immigration & Naturalization Service
Strategy Research Corporation

## Documented U.S. Immigration



The following table shows the changes in levels of non-legalization immigration for the top 15 countries of birth in 1988 and 1989. The largest increase was for Vietnam (11,791) due to the addition of the Amerasian category and increased use of the relative preferences. Immigration from the Soviet Union increased 8,056 due to larger refugee arrivals in previous years. Mexican immigration (excluding the legalization program) declined 10%, or by 6,272 in 1989. Much of this decrease is attributable to immigration by spouses of U. S. citizens who are otherwise classified.

## IMMIGRANTS ADMITTED (NON-LEGALIZATION) FROM TOP FIFTEEN COUNTRIES OF BIRTH
### 1988-1989

| | Country of Birth | 1988 | 1989 | Change | |
|---|---|---|---|---|---|
| | | | | Number | Percent |
| | Total | 574,024 | 598,724 | 24,700 | 4.3% |
| 1 | Mexico | 64,715 | 58,443 | -6,272 | -9.7 |
| 2 | Philippines | 49,719 | 49,535 | -184 | -0.4 |
| 3 | Vietnam | 25,780 | 37,571 | 11,791 | 45.7 |
| 4 | Korea | 34,605 | 32,204 | -2,401 | -6.9 |
| 5 | India | 26,145 | 28,498 | 2,353 | 9.0 |
| 6 | China, Mainland | 28,378 | 27,394 | -984 | -3.5 |
| 7 | Dominican Republic | 26,924 | 25,553 | -1,371 | -5.1 |
| 8 | Jamaica | 20,613 | 21,899 | 1,286 | 6.2 |
| 9 | Iran | 15,154 | 17,128 | 1,974 | 13.0 |
| 10 | El Salvador | 11,431 | 13,451 | 2,020 | 17.7 |
| 11 | United Kingdom | 13,091 | 12,841 | -250 | -1.9 |
| 12 | Laos | 10,666 | 12,467 | 1,801 | 16.9 |
| 13 | Taiwan | 9,619 | 12,457 | 2,838 | 29.5 |
| 14 | Soviet Union | 2,945 | 11,001 | 8,056 | 273.5 |
| 15 | Colombia | 9,981 | 10,504 | 523 | 5.2 |
| | Other | 224,258 | 227,778 | 3,520 | 1.6 |

Source: U.S. Immigration and Naturalization Service
Strategy Research Corporation

### 3. Geographic Distribution

The leading metropolitan area of intended residence was Los Angeles-Long Beach, CA with 262,805 immigrants. New York, NY (116,598), Chicago, IL (60,336), Anaheim-Santa Ana, CA (36,597), and Houston, TX (34,682) followed as the next most frequent destinations. Approximately 34% of the legalized immigrants reside in Los Angeles. New York remains the leading destination of non-legalized immigrants with 96,197 or 11% of the total.

**IMMIGRANTS ADMITTED TO TOP TWENTY METROPOLITAN AREAS OF INTENDED RESIDENCE 1989**

| | Metropolitan Area | Total | | Non-legalization | | IRCA legalization | |
|---|---|---|---|---|---|---|---|
| | | Number | Percent | Number | Percent | Number | Percent |
| | Total Top 20 Metro Areas | 757,753 | 52.1% | 381,640 | 43.1% | 376,113 | 66.2% |
| 1 | Los Angeles-Long Beach | 262,445 | 18.1 | 71,372 | 8.1 | 191,073 | 33.7 |
| 2 | New York, NY | 116,598 | 8.0 | 96,197 | 10.9 | 20,401 | 3.6 |
| 3 | Chicago, IL | 60,336 | 4.2 | 23,150 | 2.6 | 37,186 | 6.5 |
| 4 | Anaheim-Santa Ana, CA | 36,597 | 2.5 | 15,329 | 1.7 | 21,268 | 3.7 |
| 5 | Houston, TX | 34,682 | 2.4 | 10,633 | 1.2 | 24,049 | 4.2 |
| 6 | Washington, DC-MD-VA | 26,695 | 1.8 | 20,429 | 2.3 | 6,266 | 1.1 |
| 7 | Miami-Hialeah, FL | 24,569 | 1.7 | 16,644 | 1.9 | 7,925 | 1.5 |
| 8 | San Diego, CA | 23,233 | 1.6 | 12,268 | 1.4 | 10,965 | 2.0 |
| 9 | San Francisco, CA | 22,754 | 1.6 | 15,828 | 1.8 | 6,926 | 1.2 |
| 10 | Riverside-San Bernardino, CA | 20,629 | 1.4 | 5,946 | 0.7 | 14,683 | 2.6 |
| 11 | San Jose, CA | 19,891 | 1.4 | 11,839 | 1.3 | 8,052 | 1.4 |
| 12 | Boston, MA | 17,160 | 1.2 | 15,365 | 1.7 | 1,795 | 0.3 |
| 13 | Oakland, CA | 15,843 | 1.1 | 11,505 | 1.3 | 4,338 | 0.8 |
| 14 | Dallas, TX | 15,601 | 1.1 | 5,894 | 0.7 | 9,707 | 1.7 |
| 15 | Newark, NJ | 12,436 | 0.8 | 10,768 | 1.2 | 1,668 | 0.3 |
| 16 | Nassau-Suffolk, NY | 10,589 | 0.7 | 8,830 | 1.0 | 1,759 | 0.3 |
| 17 | Bergen-Passaic, NJ | 10,527 | 0.7 | 9,120 | 1.0 | 1,407 | 0.2 |
| 18 | Philadelphia, PA-NJ | 10,427 | 0.7 | 9,741 | 1.1 | 686 | 0.1 |
| 19 | El Paso, TX | 8,583 | 0.6 | 3,990 | 0.4 | 4,593 | 0.8 |
| 20 | Jersey City, NJ | 8,158 | 0.5 | 6,792 | 0.8 | 1,366 | 0.2 |
| | All Other Areas | 695,753 | 47.9 | 503,771 | 56.9 | 191,982 | 33.8 |
| | Total | 1,453,506 | 100.0% | 885,411 | 100.0% | 568,095 | 100.0% |

Source: U.S. Immigration and Naturalization Service
Strategy Research Corporation

## D. UNDOCUMENTED IMMIGRATION UPDATE

Since 1980, Strategy Research has been engaged in researching the U.S. Hispanic Market. While much of this research has been in the form of proprietary marketing studies for our clients, we have also been studying and measuring the size and character of the U.S. Hispanic Market. To produce accurate Hispanic population estimates, we have had to maintain updated information on documented and undocumented immigration reports from the U.S. Immigration and Naturalization Service and other similar public agencies.

**It is clear that the size of the U.S. Hispanic population has always been understated.** It certainly was undercounted by the 1980 Census, and subsequently published Census estimates during the 1980's. The provisions of the Immigration and Reform Act of 1986 have shed some light on the degree to which the U.S. Hispanic population has been undercounted. The Act permitted undocumented aliens who had been in the U.S. illegally prior to 1982, to apply for legalization, unconditionally, until January 30, 1989.

According to provisional data released by the Legalization Office Support System of the U.S. Immigration and Naturalization Service, a total of just over three million applications were filed. Of this total, 2.7 million (86%) were by persons of Hispanic origin. Of these 2.7 million, 1.6 million applied under the pre-1982 provisions of the Act, and the balance came from individuals applying under the Special Agricultural Worker provisions of the Act. The balance of the applications (1.3 million) came from those persons applying under the Special Agricultural Worker provisions of the Act. This provision applied to agricultural workers who were residing in the country illegally and had worked (in the U.S.) for at least 90 days, prior to May 1986. Of the total 1.3 million agricultural workers who applied, 1.1 million or 85% were of Hispanic-origin.

These data are the first documented numbers of illegal or undocumented immigrants who have been present in the population. Discussions with personnel at the Immigration and Naturalization Service and our own research suggest that those persons coming forward to register under the provisions of the Reform Act represented anywhere from 25% to 75% of all those persons actually eligible. Therefore, estimates of the number of undocumented immigrants in the population, who arrived in the U.S. prior to 1982, range from between 2.4 million and 7.1 million. Applying the middle of that range indicates that there were approximately 3.5 million persons residing in the country illegally prior to 1982. And, of course, these figures do not take into consideration those individuals entering and residing illegally in the country since 1982.

The table on the next page lists the distribution of legalization applications by Hispanic country of citizenship with 200 or more applicants, as of December 23, 1990.

# ESTIMATED LEGALIZATION APPLICATIONS BY HISPANICS BY COUNTRIES OF CITIZENSHIP WITH 200 OR MORE APPLICANTS
## AS OF 12/23/90

| | TOTAL APPLICATIONS | | I-687 APPLICATIONS * | | I-700 APPLICATIONS ** | |
|---|---|---|---|---|---|---|
| COUNTRY | NUMBER | PERCENT | NUMBER | PERCENT | NUMBER | PERCENT |
| Mexico | 2,269,749 | 84.4% | 1,229,903 | 78.9% | 1,039,846 | 92.0% |
| El Salvador | 168,134 | 6.3 | 143,150 | 9.3 | 24,984 | 2.2 |
| Guatemala | 71,004 | 2.7 | 52,575 | 3.4 | 18,429 | 1.7 |
| Colombia | 34,793 | 1.3 | 26,380 | 1.7 | 8,413 | 0.8 |
| Dominican Republic | 28,105 | 1.0 | 18,281 | 1.2 | 9,824 | 0.9 |
| Peru | 19,764 | 0.7 | 12,690 | 0.9 | 7,074 | 0.6 |
| Honduras | 18,138 | 0.7 | 13,071 | 0.8 | 5,067 | 0.5 |
| Nicaragua | 16,767 | 0.6 | 16,013 | 1.0 | 754 | 0.1 |
| Ecuador | 16,343 | 0.6 | 13,231 | 0.8 | 3,112 | 0.3 |
| Belize | 6,254 | 0.2 | 6,122 | 0.4 | 132 | 0.0 |
| Argentina | 6,001 | 0.2 | 5,120 | 0.3 | 881 | 0.1 |
| Brazil | 7,763 | 0.3 | 1,761 | 0.1 | 6,002 | 0.5 |
| Chile | 4,886 | 0.2 | 4,152 | 0.3 | 734 | 0.0 |
| Bolivia | 4,652 | 0.2 | 3,115 | 0.2 | 1,537 | 0.2 |
| Guyana | 4,219 | 0.2 | 3,114 | 0.2 | 1,105 | 0.1 |
| Costa Rica | 3,777 | 0.1 | 3,113 | 0.2 | 664 | 0.0 |
| Venezuela | 2,642 | 0.1 | 2,177 | 0.1 | 465 | 0.0 |
| Panama | 2,222 | 0.1 | 2,010 | 0.1 | 212 | 0.0 |
| Uruguay | 2,253 | 0.1 | 1,833 | 0.1 | 420 | 0.0 |
| Spain | 1,277 | 0.0 | 838 | 0.0 | 439 | 0.0 |
| Cuba | 689 | 0.0 | 670 | 0.0 | 19 | 0.0 |
| Paraguay | 373 | 0.0 | 246 | 0.0 | 127 | 0.0 |
| TOTAL | 2,689,805 | 100.0% | 1,559,565 | 100.0% | 1,130,240 | 100.0% |

* Form I-687 - those applying under the pre-1982 provisions of the Act
** Form I-700 - those applying under the Special agricultural Worker provisions

Source: U.S. Immigration and Naturalization Service
Statistical Analysis Branch
Office of Plans and Analysis
Strategy Research Corporation

The following table depicts the distribution of all Legalization Applications by state of residence. This information is not available by country of origin. Hispanics however, represented 89% of all applicants and similar shares of both pre-1982 Applicants and the Special Agricultural Worker Applicants.

### ESTIMATED LEGALIZATION APPLICATIONS BY STATE OF RESIDENCE AS OF 12/23/90

| | TOTAL APPLICATIONS | | I-687 APPLICATIONS * | | I-700 APPLICATIONS ** | |
|---|---|---|---|---|---|---|
| REGION / STATE | NUMBER | PERCENT | NUMBER | PERCENT | NUMBER | PERCENT |
| **NORTHEAST** | **252,025** | **8.3%** | **166,325** | **9.5%** | **85,700** | **6.7%** |
| New England | 27,580 | 0.9% | 15,506 | 0.9% | 12,074 | 0.9% |
| Maine | 333 | 0.0 | 84 | 0.0 | 249 | 0.0 |
| New Hampshire | 622 | 0.0 | 326 | 0.0 | 296 | 0.0 |
| Vermont | 65 | 0.0 | 44 | 0.0 | 21 | 0.0 |
| Massachusetts | 17,646 | 0.6 | 9,681 | 0.6 | 7,965 | 0.6 |
| Rhode Island | 2,873 | 0.1 | 2,118 | 0.1 | 755 | 0.1 |
| Connecticut | 6,041 | 0.2 | 3,253 | 0.2 | 2,788 | 0.2 |
| Middle Atlantic | 224,445 | 7.4% | 150,819 | 8.6% | 73,626 | 5.8% |
| New York | 170,527 | 5.6 | 118,582 | 6.8 | 51,945 | 4.1 |
| New Jersey | 44,980 | 1.5 | 29,136 | 1.6 | 15,844 | 1.2 |
| Pennsylvania | 8,938 | 0.3 | 3,101 | 0.2 | 5,837 | 0.5 |
| **NORTH CENTRAL** | **194,451** | **6.4%** | **138,302** | **7.8%** | **56,149** | **4.4%** |
| East North Central | 177,655 | 5.9% | 130,110 | 7.4% | 47,545 | 3.7% |
| Ohio | 2,851 | 0.1 | 1,603 | 0.1 | 1,248 | 0.1 |
| Indiana | 3,546 | 0.1 | 1,818 | 0.1 | 1,728 | 0.1 |
| Illinois | 160,055 | 5.3 | 121,406 | 6.9 | 38,649 | 3.0 |
| Michigan | 6,949 | 0.2 | 2,468 | 0.1 | 4,481 | 0.4 |
| Wisconsin | 4,254 | 0.1 | 2,815 | 0.2 | 1,439 | 0.1 |
| West North Central | 16,796 | 0.6% | 8,192 | 0.5% | 8,604 | 0.7% |
| Minnesota | 1,985 | 0.1 | 1,213 | 0.1 | 772 | 0.1 |
| Iowa | 1,923 | 0.1 | 735 | 0.0 | 1,188 | 0.1 |
| Missouri | 2,186 | 0.1 | 1,300 | 0.1 | 886 | 0.1 |
| North Dakota | 68 | 0.0 | 21 | 0.0 | 47 | 0.0 |
| South Dakota | 106 | 0.0 | 74 | 0.0 | 32 | 0.0 |
| Nebraska | 2,969 | 0.1 | 1,098 | 0.1 | 1,871 | 0.1 |
| Kansas | 7,559 | 0.2 | 3,751 | 0.2 | 3,808 | 0.3 |
| **SOUTH** | **703,788** | **23.3%** | **406,320** | **23.1%** | **301,841** | **23.7%** |
| South Atlantic | 241,032 | 8.0% | 84,757 | 4.8% | 160,776 | 12.6% |
| Delaware | 1,190 | 0.0 | 286 | 0.0 | 904 | 0.1 |
| Maryland | 12,217 | 0.4 | 8,694 | 0.5 | 8,024 | 0.6 |
| District of Columbia | 6,091 | 0.2 | 4,591 | 0.3 | 1,500 | 0.1 |
| Virginia | 19,340 | 0.6 | 10,195 | 0.6 | 9,145 | 0.7 |
| West Virginia | 402 | 0.0 | 131 | 0.0 | 271 | 0.0 |
| North Carolina | 17,468 | 0.7 | 2,843 | 0.2 | 14,625 | 1.2 |
| South Carolina | 3,401 | 0.1 | 831 | 0.0 | 2,570 | 0.2 |
| Georgia | 23,690 | 0.8 | 7,129 | 0.4 | 16,561 | 1.3 |
| Florida | 157,233 | 5.2 | 50,057 | 2.8 | 107,176 | 8.4 |

Continued . . . . .

## ESTIMATED LEGALIZATION APPLICATIONS BY STATE OF RESIDENCE

### AS OF 12/23/90

(Continued)

| | TOTAL APPLICATIONS | | I-687 APPLICATIONS * | | I-700 APPLICATIONS ** | |
|---|---|---|---|---|---|---|
| STATE | NUMBER | PERCENT | NUMBER | PERCENT | NUMBER | PERCENT |
| **SOUTH** (Continued) | | | | | | |
| East South Atlantic | 5,402 | 0.2% | 2,499 | 0.1% | 2,775 | 0.2% |
| Kentucky | 619 | 0.0 | 400 | 0.0 | 219 | 0.0 |
| Tennessee | 2,307 | 0.1 | 1,135 | 0.1 | 1,042 | 0.1 |
| Alabama | 1,782 | 0.1 | 592 | 0.0 | 1,192 | 0.1 |
| Mississippi | 694 | 0.0 | 372 | 0.0 | 322 | 0.0 |
| West South Central | 457,354 | 15.1% | 319,064 | 18.2% | 138,290 | 10.9% |
| Arkansas | 2,630 | 0.1 | 714 | 0.0 | 1,916 | 0.2 |
| Louisiana | 3,082 | 0.1 | 1,967 | 0.1 | 1,115 | 0.1 |
| Oklahoma | 10,950 | 0.4 | 6,904 | 0.4 | 4,046 | 0.3 |
| Texas | 440,692 | 14.5 | 309,479 | 17.7 | 131,213 | 10.3 |
| **WEST** | **1,870,521** | **61.9%** | **1,045,686** | **59.5%** | **824,835** | **65.0%** |
| Mountain | 170,626 | 5.6% | 72,332 | 4.1% | 98,294 | 7.7% |
| Montana | 242 | 0.0 | 95 | 0.0 | 147 | 0.0 |
| Idaho | 10,267 | 0.3 | 2,160 | 0.1 | 8,107 | 0.6 |
| Wyoming | 1,060 | 0.0 | 664 | 0.0 | 396 | 0.0 |
| Colorado | 22,365 | 0.8 | 10,290 | 0.6 | 12,075 | 1.0 |
| New Mexico | 27,909 | 0.9 | 16,303 | 0.9 | 11,606 | 0.9 |
| Arizona | 82,954 | 2.8 | 29,171 | 1.7 | 53,783 | 4.2 |
| Utah | 7,190 | 0.2 | 2,743 | 0.2 | 4,447 | 0.4 |
| Nevada | 18,639 | 0.6 | 10,906 | 0.6 | 7,733 | 0.6 |
| Pacific | 1,699,895 | 56.2% | 973,354 | 55.4% | 726,541 | 57.3% |
| Washington | 37,038 | 1.2 | 9,763 | 0.6 | 27,275 | 2.1 |
| Oregon | 27,632 | 0.9 | 4,139 | 0.2 | 23,493 | 1.9 |
| California | 1,632,341 | 54.0 | 957,753 | 54.5 | 674,588 | 53.2 |
| Alaska | 676 | 0.0 | 362 | 0.0 | 314 | 0,0 |
| Hawaii | 2,208 | 0.1 | 1,337 | 0.1 | 871 | 0.1 |
| **Total** | **3,020,785** | **100.0%** | **1,756,633** | **100.0%** | **1,268,525** | **100.0%** |
| **Total Hispanic** | **2,689,805** | **89.0%** | **1,559,565** | **88.8%** | **1,130,240** | **89.1%** |

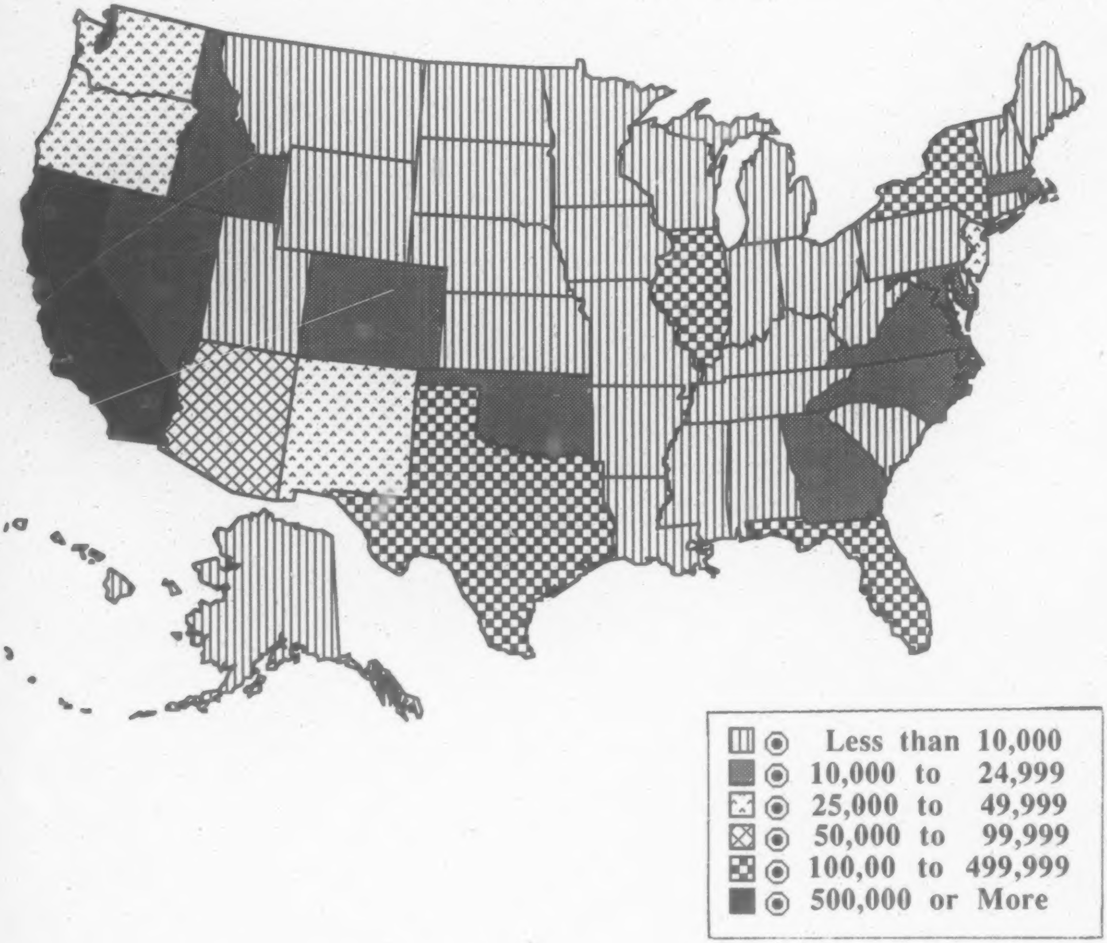
* Form I-687 - those applying under the pre-1982 provisions of the Act

** Form I-700 - those applying under the Special Agricultural Worker provisions

NOTE: 1 Upon consolidation of data on legalization applications, the duplicate records were eliminated.
2 The data is based on the most recent state of residence of the applicant. Some applicants may have shifted since the last reporting.

Source: U.S. Immigration and Naturalization Service
Statistical Analysis Branch
Office of Plans and Analysis
Strategy Research Corporation

## Distribution of Legalization Applications by State of Residence - 1990


Less than 10,000
10,000 to 24,999
25,000 to 49,999
50,000 to 99,999
100,00 to 499,999
500,000 or More

The following table presents Strategy Research Corporation's estimates of the Hispanic population of the United States during the first nine years of the decade. The estimates are based on data published by both the U.S. Census Bureau and the U.S. Naturalization and Immigration Service as well as the results of our own independent analysis and surveys.

We have estimated the January 1, 1991 Hispanic population of the United States at approximately 24.9 million. The determinants of the calculation from which this estimate has been derived, as noted in the table, include the cohort-survival change of the Hispanic population, or the natural rate of change, based on the ratio between births and deaths. These data, have been sourced by the U.S. Bureau of the Census, in its **CURRENT POPULATION REPORTS** series on **POPULATION ESTIMATES AND PROJECTIONS.** Also included in the calculation are net immigration data. Documented immigration figures are those reported by the U.S. Immigration and Naturalization Service between 1981 and 1989, and Strategy Research Corporation's estimates for 1990 and 1991.

### COMPONENTS OF U.S. HISPANIC POPULATION CHANGE

### 1980-1991

| | | COMPONENTS OF CHANGE DURING PERIOD | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | COHORT SURVIVAL CHANGE | | | IMMIGRATION | | |
| YEAR | Population January 1 (000) | Net Change (000) | Natural (000) | Births (000) | Deaths (000) | Net (000) | Documented (000) | Undocumented (000) |
| 1980 | 14,603.7 | 415.5 | 300.0 | 368.0 | 68.0 | 115.5 | 115.5 | N.A. |
| 1981 | 15,019.2 | 1,863.2 | 319.0 | 386.0 | 67.0 | 1,544.2* | 192.5 | 1,351.7 |
| 1982 | 16,882.4 | 720.1 | 338.0 | 405.0 | 67.0 | 382.1 | 142.4 | 239.7 |
| 1983 | 17,602.5 | 788.3 | 361.0 | 430.0 | 69.0 | 427.3 | 152.3 | 275.0 |
| 1984 | 18,390.8 | 836.2 | 382.0 | 453.0 | 71.0 | 454.2 | 154.2 | 300.0 |
| 1985 | 19,227.0 | 947.6 | 401.0 | 475.0 | 74.0 | 546.6 | 171.6 | 375.0 |
| 1986 | 20,174.6 | 1,068.2 | 421.0 | 497.0 | 76.0 | 647.2 | 197.2 | 450.0 |
| 1987 | 21,242.8 | 1,165.4 | 439.0 | 518.0 | 79.0 | 726.4 | 201.4 | 525.0 |
| 1988 | 22,408.2 | 1,269.6 | 457.0 | 538.0 | 81.0 | 812.6 | 212.6 | 600.0 |
| 1989 | 23,677.8 | 1,372.7 | 473.0 | 557.0 | 84.0 | 899.7 | 224.7 | 675.0 |
| 1990 | 24,293.4 | 615.6 | 212.4 | 250.1 | 37.7 | 403.2 | 100.7 | 302.5 |
| 1991 | 24,952.2 | 696.5 | 240.3 | 282.9 | 42.6 | 456.2 | 113.9 | 342.3 |
| 1980 - 1991 | | 11,758.9 | 4,343.7 | 5,160.0 | 816.3 | 7,415.2 | 1,979.0 | 5,436.2 |

* 50% of the 2.7 million Hispanic legalization applications filed under the provisions of the Immigration Reform and Control Act of 1986, plus 192,500 documented Hispanic immigrants of 1981.

Source: U.S. Bureau of the Census
U.S. Immigration and Naturalization Service
Strategy Research Corporation

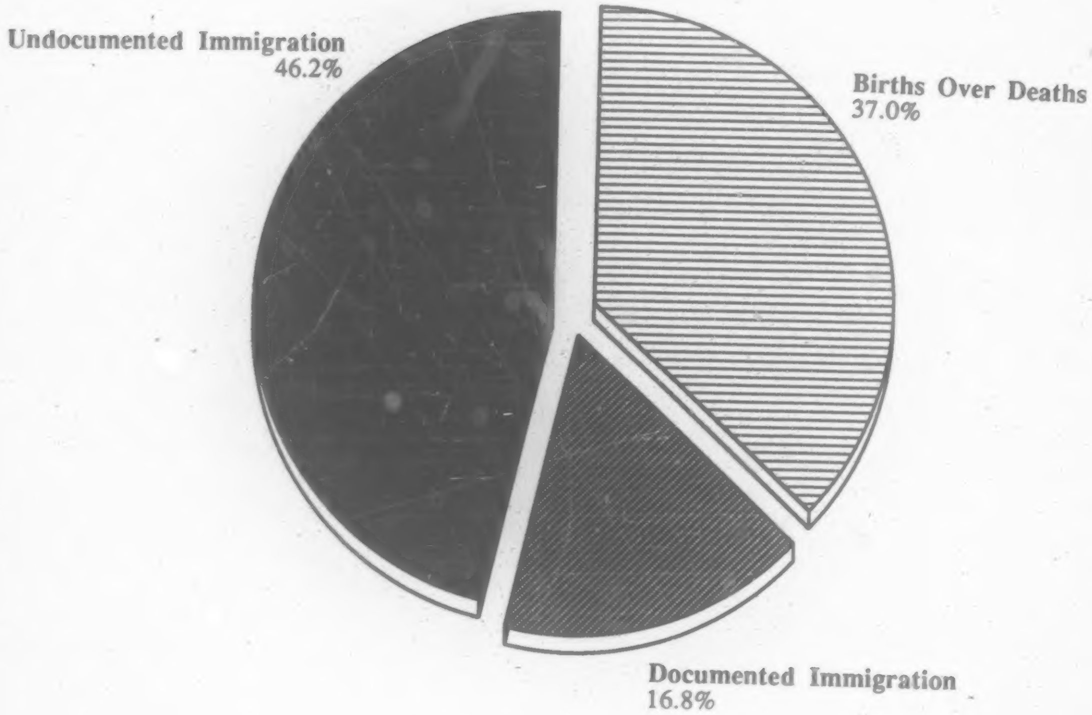
Immigration continues to play the major role in the growth of the country's Hispanic population. As shown below, approximately 63% of the population gain experienced by the U.S. Hispanic population was accounted for by immigration. Moreover, close to three-fourths of these population movements were undocumented, representing individuals who crossed borders illegally or who violated temporary visas. About 37% of the Hispanic population growth was a product of natural growth, or the number of births over deaths.

## SUMMARIZED COMPONENTS OF CHANGE
## U.S. HISPANIC POPULATION
## 1980 - 1991

| | Number | Percent |
|---|---|---|
| Total Increase 1980 - 1991 | 11,758,900 | 100.0% |
| Cohort Survival Net | 4,343,700 | 37.0% |
| Deaths | 816,300 | -6.9 |
| Births | 5,160,000 | 43.9 |
| Net Immigration | 7,415,200 | 63.0% |
| Documented | 1,979,000 | 16.8 |
| Undocumented | 5,436,200 | 46.2 |

Source: U.S. Bureau of the Census
U.S. Immigration and Naturalization Service
Strategy Research Corporation

## Components of U.S. Hispanic Population Change 1980-1991



## E. 1991 U. S. PERSPECTIVE

Throughout most of the 1980's, the media took great pains to recognize the growth rate of U.S. Hispanics, this "new" segment of Americana, but they were growing at geometric rates without the media's attention, blessings or rhetoric. The growth of Hispanics in the United States has been primarily the result of immigration as has been documented in this section of the report. In the table Components of U. S. Hispanic Population Change, it is noted that only 17% of Hispanic population growth over the period 1980 to 1991 was the result of documented immigration, while 38% was the result of net natural increase, and the largest portion, 46%, was the result of undocumented immigration.

Most of the new residents are full adult consumer purchasing "units", living in larger households, collectively contributing to the common good of their families (or extended families), and utilizing a resourcefulness seldom observed elsewhere in recent times. Hispanics have been getting involved in local, state and national politics, establishing businesses, and working hard to make those businesses grow; building homes, rearing and educating offspring, and propelling themselves headlong into the mainstream of society in the United States. The economic ingenuity being employed could only reap such handsome rewards in this country, and most Hispanics are making the most of every opportunity.

The immigrant of yesterday has paved the way for the immigrants of tomorrow, and recent legislation has opened the door even wider to new immigrants.

### Immigration Act of 1990

On November 29th, 1990, the President of the United States signed the Immigration Act of 1990 into law. This Act constitutes the most sweeping reform of U.S. immigration laws in their 66 years of existence. The new provisions affect immigrants with special skills, diverse national origins, money to invest and close family members living in the United States.

Immigration will be allowed to climb from 500,000 annually, to 700,000 for the next three years, and then to decrease to an annual immigration ceiling of 675,000 after that. In effect, this allows for more athletes, researchers and multinational executives; more Italians, Irish, Poles and other national groups, whose numbers have declined in recent years. Additionally, more people with close family members in the United States will have the opportunity to immigrate to this country, the segment of the Act that will especially affect Hispanics.

Specifically, provisions in the new law will:

- Grant temporary safe haven to an estimated 500,000 Salvadorans already in the United States, staying deportation through July 1992, allowing them to live and work here for at least another 18 months;

- Set aside 48,000 visas annually (under its "diversity provision") for individuals from 35 countries whose immigrant numbers have declined in recent years, as the numbers of immigrants from Asia and Latin America have dramatically increased;

- Preclude exclusion of any immigrant on the basis of sexual orientation;

- Bar a second review in many of the cases of immigrants who have received political asylum, as is the situation for thousands of Nicaraguan political asylum recipients when they were eliminated from the safe haven provision;
- Provide easier access to federal assistance for communities that have become benefactors of a sudden immigration influx, such as occurred at the time of the 1980 Mariel boatlift, or when thousands of Nicaraguans arrived in late 1988 and early 1989;
- Reserve 140,000 visas a year for immigrants with special skills and talents, up from the previous annual level of 54,000;
- Set a visa quota of 10,000 for foreigners with at least $1 million to invest;
- Give the Secretary of Health and Human Services the authority to remove AIDS from the list of diseases for which an alien may be excluded;
- Repeal a 1952 law that barred entry to aliens affiliated with "subversive organizations" who advocated "subversive doctrines;"
- Allow the government to exclude foreigners from a country on the basis of foreign policy concerns; and,
- Increase the penalties for aliens who commit crimes. This provision allows the Immigration and Naturalization Service to reject any claim of asylum or other application from aliens jailed for a felony, and to deport them as soon as sentencing is completed, or sooner, if the source country will accept their return.

Most visas will continue to be issued to relatives of foreigners already living in the U. S, with approximately 300,000 set aside each year just for immigrants spouses and children.

The law contains no provisions that specifically address any single major immigration center in the United States, but **South Florida, Texas and Southern California will be broadly affected with as many as one million or more Hispanic immigrants over the next two to three years.**

## F. SUMMARY

- Immigration has always played a major role, although to varying degrees, in the make-up of population growth in the U.S. Between 1850 and 1900, legal immigration accounted for 32% of the country's population growth. This increased to nearly 50% between 1900 and 1920 when waves of European immigrants emigrated to this country.

- European immigration continued strong through the post-war years of the 1940's and 1950's, although it shifted from Northern Europe to Southern and Eastern Europe.

- Hispanic population in the U.S. received its first major impetus with the independence and statehood of Texas. Mexicans have always accounted for the largest share of Hispanic growth in the United States, both in terms of natural growth (births over deaths) and in terms of legal and illegal immigration.

- Between 1821, when such records were first maintained, and 1920, approximately 300,000 Mexican immigrants were recorded entering the U.S. During the next 40 years, 842,000 Mexicans were legally admitted to the U.S., and approximately another 1 million entered legally during the ensuing 20 years. Approximately one million Mexicans emigrated legally to the U.S. between 1980 and 1989. Since 1951, an estimated 2.4 million Mexicans legally emigrated to the U.S.

- Between 1951 and 1989, total legal Hispanic emigration to the U.S. amounted to approximately 5.3 million, the largest amount of legal immigration for any such group, accounting for 33% of all legal immigration during the period.

- A total of 1.1 million aliens were granted legal permanent resident status in the United States during fiscal year 1989. A total of 492,200 aliens were legalized under provisions of the Immigration Reform and Control Act (IRCA) of 1986. The total number of immigrants admitted in 1989 excluding legalization was 598,724 an increase of 4% over the comparable number in 1988.

- The leading metropolitan area of intended residence was Los Angeles-Long Beach, CA with 262,805 immigrants. New York, NY (116,598), Chicago, IL (60,336), Anaheim-Santa Ana, CA (36,597), and Houston, TX (34,682) followed as the next most frequent destinations. Approximately 34% of all legalized immigrants reside in Los Angeles. New York remains the leading destination of non-legalization immigrants with 96,197 or 11% of the total.

- Little or no hard, reliable data is available to measure the numbers of illegal or undocumented immigrants that enter the U.S. The response to the Immigration and Reform and Control Act of 1986 provides the first semblance of data documenting the presence of illegal aliens in the U.S. Approximately 3.1 million people registered under the provisions of the Act, who had either been in the U.S. illegally prior to 1982 (58%) or who had worked in agriculture for 90 days prior to May 1986. The majority (89%) of all applicants were of Hispanic or Latin origin.

- Hispanic fertility rates, while declining, remain well above non-Hispanic averages.

- The preponderance of evidence shows that the Census Bureau did not correctly enumerate undocumented alien residents accurately in the 1980 Census. Moreover, a substantial undercount of as much as 13% affects the accuracy of the 1990 Census concerning Hispanics, as discussed in Chapter II of this report, and as noted in the Appendix.

- Approximately 7.4 million Hispanics are estimated to have emigrated to the U.S. since 1980. Of this total, 27% or 2 million were documented and 5.4 million or 73% were undocumented.

- The January 1, 1991 U.S. Hispanic population is estimated at 24.9 million, based on the detailed research of documented and undocumented immigration, and other factors, prepared for this report.

# IV

# POPULATION AND DEMOGRAPHIC PROFILE

# IV. POPULATION AND DEMOGRAPHIC PROFILE

## A. WORLD RANK

The countries of the world with the largest Hispanic populations are listed on the following table. As of its 1991 Census, Mexico continues to contain the largest Hispanic population of any Hispanic country, with approximately 81.1 million persons. Spain was second, with 39.4 million, followed by Colombia at 33.8 million, and Argentina, at 32.7 million. The United States' 1991 Hispanic population of 24.9 million was the fifth-largest of any country in the world.

### POPULATION OF MAJOR HISPANIC COUNTRIES AND U.S. HISPANIC POPULATION 1989, 1991 AND 2000

| | POPULATION | | |
|---|---|---|---|
| Country | 1989 (Millions) | 1991 (Millions) | 2000 (Millions) |
| Mexico | 83.5 | 81.1* | 108.5 |
| Spain | 39.0 | 39.4 | 40.5 |
| Colombia | 30.6 | 33.8 | 39.7 |
| Argentina | 32.0 | 32.7 | 36.0 |
| **United States** | **23.7** | **24.9** | **34.2** |
| Peru | 21.4 | 22.4 | 26.4 |
| Venezuela | 18.8 | 20.2 | 24.6 |
| Chile | 12.6 | 13.3 | 15.0 |
| Cuba | 10.4 | 10.7 | 11.6 |
| Ecuador | 10.2 | 10.8 | 13.0 |
| Guatemala | 8.7 | 9.3 | 11.4 |
| Dominican Republic | 6.9 | 7.4 | 8.7 |
| Bolivia | 6.9 | 6.8 | 8.2 |
| El Salvador | 5.4 | 5.4 | 6.5 |
| Honduras | 4.8 | 5.4 | 6.9 |
| Paraguay | 4.4 | 4.8 | 6.0 |
| Puerto Rico | 3.4 | 3.9 | 3.4 |
| Nicaragua | 3.6 | 3.8 | 4.9 |
| Uruguay | 3.0 | 3.1 | 3.2 |
| Costa Rica | 2.9 | 3.1 | 3.8 |
| Panama | 2.3 | 2.5 | 2.9 |

*Preliminary census count.

Source: U.S. Bureau of the Census, Center for International Research
Strategy Research Corporation

## B. COUNTRY OF ORIGIN

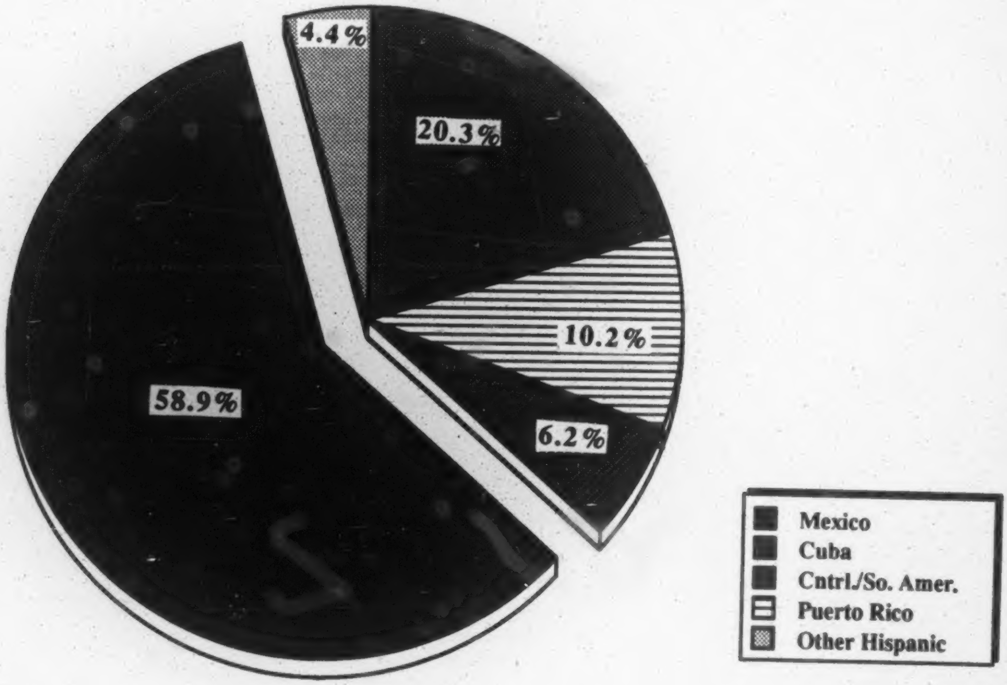
Mexicans continue to represent the largest group of Hispanics residing in the United States, with a total of approximately 14.7 million persons, or 59% of the country's total number of Hispanics. The second largest group of Hispanics is represented by those whose origins are in Central America, who account for 14% of the Hispanic total, numbering some 3.4 million as of 1991. Puerto Ricans, at 2.5 million, account for just over 10% of the U.S. Hispanic population, followed by 1.7 million Hispanics whose origins are in South America, accounting for 7%, and Cubans, at 6%. The estimated 850,000 persons originating from the Caribbean represent 3% of all U.S. Hispanics. The following page contains a graph that depicts the distribution of country of origin among U.S. Hispanics, and is followed by a map that depicts these country of origin distributions according to U.S. Region of residence.

### COUNTRY OF ORIGIN
### U.S. HISPANIC POPULATION
### 1991

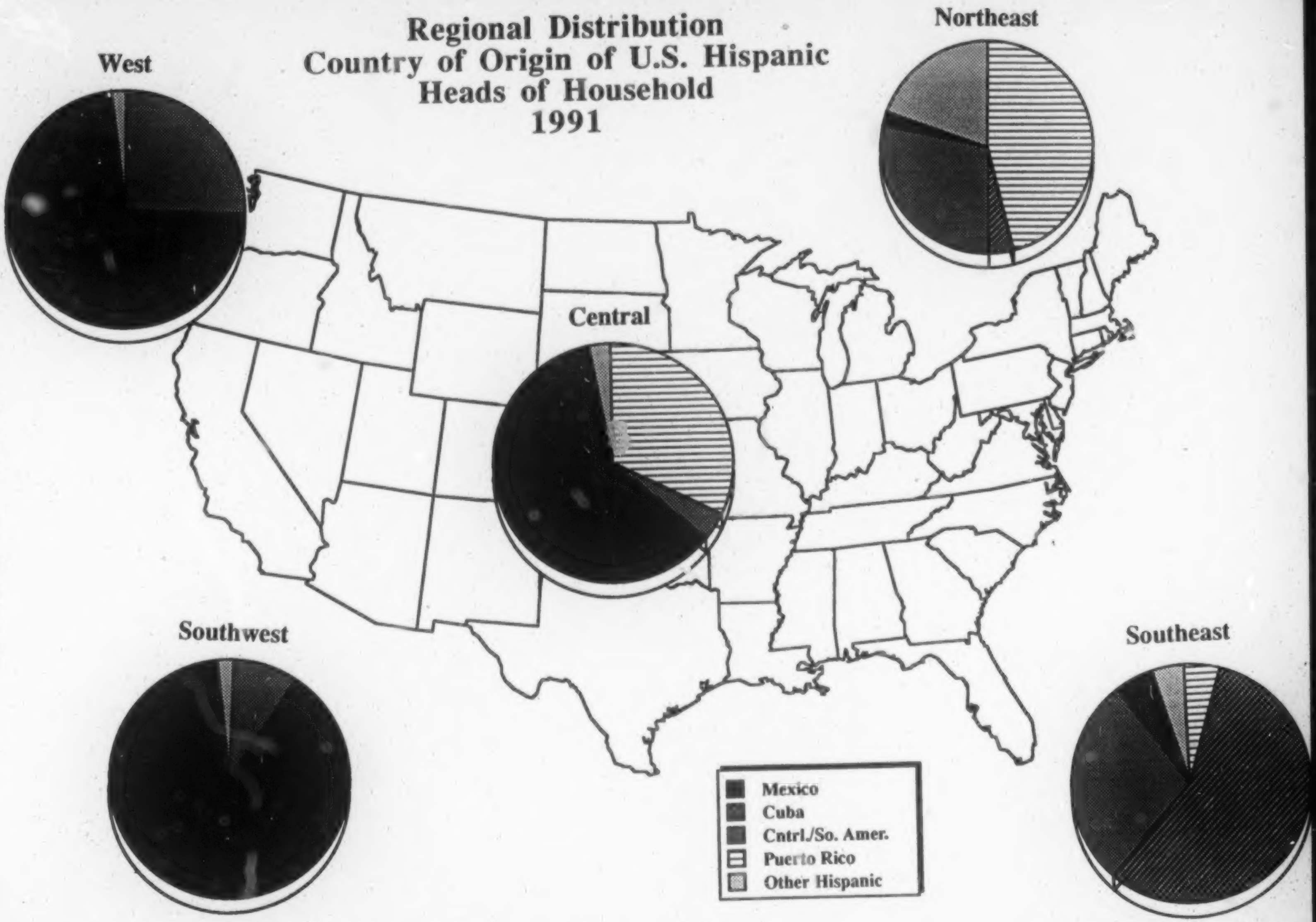
| Nationality | Number (000) | Percent of Total |
|---|---|---|
| Mexico | 14,680.9 | 58.9% |
| Central America | 3,364.9 | 13.5 |
| Puerto Rico | 2,542.4 | 10.2 |
| South America | 1,694.9 | 6.8 |
| Cuba | 1,545.4 | 6.2 |
| Caribbean | 847.4 | 3.4 |
| Other Hispanic | 249.3 | 1.0 |
| TOTAL | 24,925.2 | 100.0% |

Source: Strategy Research Corporation

## Country of Origin of U.S. Hispanic Population



## Regional Distribution Country of Origin of U.S. Hispanic Heads of Household 1991


West
Northeast
Central
Southwest
Southeast
Mexico
Cuba
Cntrl./So. Amer.
Puerto Rico
Other Hispanic

The number of Hispanics whose origins are in Central and South American countries grew at the fastest pace among U.S. Hispanic origin populations during the decade. Their numbers increased from 1.7 million to close to 5.1 million, a growth rate of nearly 200%. Cubans represented the second-fastest growing Hispanic group, nearly doubling (92%) their numbers during the period. The Mexican-American population also experienced a substantial gain, increasing by 68%, or 5.9 million persons during the 1980's.

## CHANGE IN COUNTRY OF ORIGIN OF U.S. HISPANIC POPULATION GROWTH
## 1980 - 1991

| | Total Hispanic Population | | Change 1980-1991 | |
|---|---|---|---|---|
| Country/Place of Origin | 1980 (000) | 1991 (000) | Number (000) | Percent |
| Mexico | 8,740.0 | 14,690.9 | 5,940.6 | 68.0% |
| Central/South America | 1,693.3 | 5,059.8 | 3,366.5 | 198.8 |
| Puerto Rico | 2,014.0 | 2,542.4 | 528.4 | 26.2 |
| Cuba | 803.0 | 1,545.4 | 712.4 | 92.4 |
| Other Hispanic | 1,353.4 | 1,096.7 | -256.4 | -19.0 |
| Total | 14,603.7 | 24,925.2 | 10,321.5 | 70.7% |

Source: U.S. Bureau of the Census
Strategy Research Corporation

## C. PLACE OF BIRTH

Close to three-fourths of all Hispanic heads of household residing in the United States at the present time were born outside of the United States. This is an increase over 1989 when approximately four-fifths were foreign-born. The following table shows the distribution of all U.S. and foreign-born Hispanic heads of household. This information is presented for the U.S. as whole, and for the five geographic regions of the country. As shown, the highest incidence of native Hispanic heads of household (52%) occurs in the Southwest Region, while the lowest, 6%, is reported for the Northeast Region.

### PLACE OF BIRTH
### HISPANIC HEADS OF HOUSEHOLD
### 1991

| | Place of Birth | | |
|---|---|---|---|
| | United States | Another Country | Total |
| All Hispanic Heads of Household | 18.0% | 82.0% | 100.0% |
| **Regions** | | | |
| Northeast | 5.6 | 94.4 | 100.0% |
| Southeast | 6.2 | 93.8 | 100.0% |
| Southwest | 51.5 | 48.5 | 100.0% |
| Central | 14.0 | 86.0 | 100.0% |
| West | 3.7 | 96.3 | 100.0% |

Source: Strategy Research Corporation

## COUNTRY OF ORIGIN AMONG U.S. HISPANIC HEADS OF HOUSEHOLD

## 1991

| Country of Origin | Total | U.S. REGIONS<br>North-east | <br>South-east | <br>South-west | <br>Central | <br>West |
|---|---|---|---|---|---|---|
| Mexico | 58.9% | 2.0% | 5.2% | 89.1% | 61.2% | 72.4% |
| Central and South America | 20.3 | 28.6 | 28.1 | 8.5 | 3.7 | 25.4 |
| Puerto Rico | 10.2 | 46.2 | 4.6 | 0.3 | 32.4 | 0.8 |
| Cuba | 6.2 | 3.6 | 57.0 | 0.8 | 1.3 | 0.5 |
| Other | 4.4 | 19.6 | 5.1 | 1.3 | 1.4 | 0.9 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## D. LENGTH OF RESIDENCY

The following table shows the average length of time Hispanic heads of household have resided in the United States. The data is presented for all Hispanics and according to regional distributions. **Nearly 50% of all Hispanic heads of household have lived in the United States since 1980.**

The average length of residency for all Hispanic heads of household is currently fifteen years and two months. Fewer than 2% of all U.S. Hispanic heads of household have lived in the country for only one year or less; 15% have lived in the country for between one and five years, 33% have lived in the U.S. for between five and twelve years, 19% for between twelve and twenty years, and 31% have resided in the country more than twenty years.

Some distinct regional differences exist among Hispanics' length of residency among the five delineated U.S. Regions. As shown below, the average length of residency is longest among Hispanic residents of the Southwestern Region, at nineteen years and two months. The next longest period of time is eighteen years and four months, among Hispanics of the Northeast, followed by those of the Central Region, at sixteen years and ten months, the Southeast, at 15 years and two months, and eleven years and two months of residency among Hispanics of the Western Region.

### LENGTH OF TIME OF U.S. RESIDENCE AMONG ADULT HEADS OF HOUSEHOLD HISPANICS 1991

| | | U.S. REGIONS | | | | |
|---|---|---|---|---|---|---|
| Length of Time | Total | North-east | South-east | South-west | Central | West |
| 1 Year or Less | 1.8% | 0.4% | 1.7% | 1.3% | 0.6% | 3.0% |
| 1 to 3 Years | 7.4 | 1.8 | 12.4 | 1.9 | 4.7 | 12.7 |
| 3 to 5 Years | 7.7 | 6.6 | 6.8 | 4.2 | 4.0 | 11.2 |
| 5 to 7 Years | 10.1 | 9.5 | 5.5 | 8.5 | 7.1 | 12.9 |
| 7 to 9 Years | 8.6 | 8.5 | 3.6 | 6.6 | 9.0 | 10.9 |
| 9 to 12 Years | 14.0 | 11.9 | 18.5 | 12.4 | 11.4 | 15.2 |
| **Sub-Total** | **49.6%** | **38.7%** | **48.5%** | **34.9%** | **36.8%** | **65.9%** |
| 12 to 15 Years | 8.1 | 6.1 | 5.5 | 7.2 | 12.7 | 9.3 |
| 15 to 20 Years | 11.1 | 14.4 | 8.8 | 9.3 | 18.6 | 10.6 |
| 20 Years or More | 31.2 | 40.8 | 37.2 | 48.6 | 31.9 | 14.2 |
| **Sub-Total** | **50.4%** | **61.3%** | **51.5%** | **65.1%** | **63.2%** | **34.1%** |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Average Length of Residency | 15 Yrs. 2 Mo. | 18 Yrs. 4 Mo. | 15 Yrs. 2 Mo. | 19 Yrs. 2 Mo. | 16 Yrs. 10 Mo. | 11 Yrs. 2 Mo. |

Source: Strategy Research Corporation

## E. AGE/GENDER DISTRIBUTION

The following table depicts the country's Hispanic population by age category for men and women and for children of both sexes.

### U.S. HISPANIC POPULATION AGE/SEX DISTRIBUTION

### 1991

| | Population (Millions) | Percent Distribution |
|---|---|---|
| **Men** | | |
| 18-24 Years | 1,844.5 | 7.4% |
| 25-34 Years | 2,442.7 | 9.8 |
| 35-49 Years | 1,969.1 | 7.9 |
| 50-54 Years | 373.9 | 1.5 |
| 55-64 Years | 778.9 | 3.1 |
| 65 Plus Years | 517.2 | 2.1 |
| **Sub Total** | **7,926.3** | **31.8%** |
| **Median Age** | **37.9** | -- |
| **Women** | | |
| 18-24 Years | 1,645.1 | 6.6 |
| 25-34 Years | 2,367.9 | 9.5 |
| 35-49 Years | 2,043.9 | 8.2 |
| 50-54 Years | 423.7 | 1.7 |
| 55-64 Years | 854.5 | 3.4 |
| 65 Plus Years | 666.0 | 2.7 |
| **Sub-Total** | **8,001.1** | **32.1%** |
| **Median Age** | **38.7** | -- |
| **All Children** | | |
| 0-11 Years | 5,957.1 | 23.9 |
| 12-17 Years | 3,040.7 | 12.2 |
| **Sub-Total** | **8,997.8** | **36.1%** |
| **Total Persons** | **24,925.2** | **100.0%** |
| **Median Age** | **24.0** | -- |

Source: Population Reference Bureau,
U.S. Bureau of the Census
Strategy Research Corporation

## F. HOUSEHOLD SIZE

Historically, the average household size of Hispanics in the United States has been higher than among non-Hispanics. As shown on the table below, the average number of persons residing in a Hispanic household in the U.S. is approximately 3.6. The largest household sizes are reported in the West Region (4.3), and the Southwest andCentral Regions (3.7).

### NUMBER OF PERSONS IN HISPANIC HOUSEHOLDS 1991

| | | U.S. REGIONS | | | | |
|---|---|---|---|---|---|---|
| Persons Per Household | Total | North-east | South-east | South-west | Central | West |
| 1 to 2 Persons | 23.7% | 35.0% | 27.3% | 22.4% | 11.7% | 20.6% |
| 3 Persons | 20.1 | 30.2 | 21.8 | 18.9 | 17.4 | 17.1 |
| 4 Persons | 21.9 | 22.3 | 24.1 | 21.3 | 29.1 | 20.7 |
| 5 Persons | 17.3 | 7.9 | 14.7 | 18.9 | 20.4 | 20.1 |
| 6+ Persons | 17.0 | 4.6 | 12.1 | 18.5 | 21.4 | 21.5 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Average Persons Per Household | 3.6 | 3.1 | 3.0 | 3.7 | 3.7 | 4.3 |

Source: Strategy Research Corporation

## G. EDUCATION

The majority of all U.S. Hispanics (69%) have had some junior or senior high school education. This is a substantial change from 1989, when SRC reported that approximately 53% of Hispanics at that time had some junior or senior high school education. Given the high rate of immigration that has continued since 1989, this is an indication that not only are U.S. Hispanics becoming better educated, but that the level of education among new arrivals is also quite high.

The Southeast Region continues to maintain the highest levels of education among Hispanics. In 1991, better than one-fourth (26%) of Southeastern Region Hispanics reported some level of college education, nearly three times higher than the U.S. total.

Approximately 17% of all U.S. Hispanics reported attending a trade or technical school. Regionally, the highest incidence of technical school attendance was among Southeast Hispanics (28%), followed by Hispanics in the Southwest (20%), and the West (16%).

### LEVEL OF EDUCATION AMONG HISPANICS
### 1991

| | | U.S. REGIONS | | | | |
|---|---|---|---|---|---|---|
| Schooling | Total | North-east | South-east | South-west | Central | West |
| No Schooling | 2.2% | 0.7% | 0.9% | 3.0% | 4.2% | 2.4% |
| Elementary | 19.0 | 25.7 | 13.1 | 13.0 | 34.3 | 19.5 |
| Junior High | 30.2 | 22.6 | 26.7 | 31.3 | 33.1 | 32.9 |
| High School | 39.2 | 42.7 | 33.6 | 40.6 | 22.4 | 40.3 |
| All College | 9.4 | 8.3 | 25.7 | 12.1 | 6.0 | 4.9 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Attended a Technical School | 17.1% | 10.2% | 28.0% | 19.7% | 13.0% | 16.4% |

Source: Strategy Research Corporation

## H. EMPLOYMENT

### 1. Full-Time Employment

Nearly 90% of all U.S. Hispanic households contain at least one full-time employed person . Better than one-half (51%) of all Hispanic households in the country contain two or more persons who are employed full-time. The average number of full-time employed persons per household among Hispanics is 1.7.

Among the nation's five regions, Hispanic households in the West had the most persons employed full-time per household at 1.8, while the Northeast Region had the lowest at 1.3. Moreover, nearly 55% of all Western Region Hispanic households contain two or more persons employed full-time. Hispanic households in the Southeast at 52% report the next highest incidence of two or more employed persons per household, followed by Central Region Hispanic households at 44%, and Southwest households, at 41%.

**PERSONS EMPLOYED FULL-TIME**
**WITHIN HISPANIC HOUSEHOLDS**
**1991**

| Number of Persons Employed In Household | Total | U.S. REGIONS | | | | |
|---|---|---|---|---|---|---|
| | | Northeast | Southeast | Southwest | Central | West |
| Households With At Least one Full-Time Employed Person | 89.4% | 83.1% | 86.7% | 82.7% | 88.1% | 90.1% |
| One Person | 38.0% | 42.7% | 35.0% | 40.6% | 44.1% | 34.3% |
| Two Persons | 35.9 | 35.5 | 39.0 | 32.5 | 32.2 | 38.2 |
| Three Persons | 7.8 | 3.9 | 10.4 | 5.3 | 8.1 | 10.3 |
| Four/More Persons | 4.4 | 1.0 | 2.3 | 4.3 | 3.7 | 6.3 |
| **Sub-Total (2+)** | **48.1%** | **40.4%** | **52.7%** | **42.1%** | **44.0%** | **54.8%** |
| None | 13.9 | 16.9 | 13.3 | 17.3 | 11.9 | 10.9 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Weighted Average | 1.7 | 1.3 | 1.5 | 1.4 | 1.5 | 1.8 |

Source: Strategy Research Corporation

## 2. Full-Time Employed Women

The proportion of U.S. Hispanic households containing full-time employed women is currently at 52%, with close to 57% of Western Hispanic households having full-time employed women, and Central Region households, at only 46%.

The fact that better than one-half of all U.S. Hispanic households contain women who work full-time reflects a shift from the role women have played in the past among Hispanic households. For example, in 1987, SRC reported that 40% of Hispanic women were employed full-time. Traditionally, women had been the homemaker, staying home, taking care of children, and tending to cooking and cleaning. Whether for economic reasons, for reasons of opportunity or for reasons of equality, Hispanic women are clearly entering the American work force in greater and greater numbers.

### WOMEN EMPLOYED FULL-TIME WITHIN HISPANIC HOUSEHOLDS 1991

| | | U.S. REGIONS | | | | |
|---|---|---|---|---|---|---|
| | Total | North-east | South-east | South-west | Central | West |
| Households With Women Employed Full-Time | 52.2% | 50.5% | 52.4% | 47.3% | 46.3% | 56.7% |
| Households Without Women Employed Full-Time | 47.8 | 49.5 | 47.6 | 52.7 | 53.7 | 43.3 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## I. OCCUPATION

Blue collar occupations dominate employment among Hispanic heads of household, accounting for 59% of all those employed. Close to one-fourth of all employed Hispanic heads of household are engaged in white collar occupations, including technical (10%), sales (6%), managerial (5%) and clerical (3%).

Regionally, Hispanic heads of household residing in the Southeast report the highest distribution of white collar occupations (41%), as compared with only 14% among Central Region Hispanic heads of household, and 21% among Hispanic heads of household of the West.

### OCCUPATIONS OF HISPANIC HEADS OF HOUSEHOLDS

1991

| | | U.S. REGIONS | | | | |
|---|---|---|---|---|---|---|
| | Total | Northeast | Southeast | Southwest | Central | West |
| **White Collar** | **23.9%** | **25.9%** | **40.5%** | **23.8%** | **14.4%** | **21.0%** |
| Managerial/ Professional | 4.7 | 3.6 | 14.5 | 7.8 | 2.8 | 1.4 |
| Technical | 10.0 | 8.4 | 11.5 | 9.5 | 7.4 | 10.8 |
| Administrative Support (Clerical) | 3.4 | 7.7 | 5.7 | 2.3 | 1.4 | 2.4 |
| Sales | 5.8 | 6.2 | 8.8 | 4.2 | 2.8 | 6.4 |
| **Blue Collar** | **76.1%** | **74.1** | **59.5** | **76.2** | **85.6** | **79.0** |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

# V

# ASSIMILATION

# V. ASSIMILATION

## A. OVERVIEW

Today's Hispanics are writing a new chapter in the history of the immigrants who have in the past done so much to shape the U.S. society. A Hispanic arriving in the United States today finds, for the most part, a ready acceptance and an environment with many sights and sounds which are familiar from his homeland. In many urban areas with heavy Hispanic densities, lack of English language skills are not a detriment to finding work, or shelter.

The growth and density of the U.S. Hispanic population have resulted in Hispanics, as a group, having to face far less pressure to assimilate than was common among earlier waves of immigration.

Many Hispanics who immigrated to the United States, and even those born here, are finding that the mass of population identified as Hispanic, provides them with the support needed to maintain their cultural heritage. As the Hispanic population grows so do the institutions which foster Hispanic culture. Institutions such as the media, and religious, charitable, social organizations have increased in number and diversity as the population has increased. The reliance on Spanish and the interest in Hispanic products have been increasingly accommodated by non-Hispanic retailers, service providers and manufacturers.

Today's Hispanics are redefining patterns of assimilation to suit their desire to retain their heritage while reaching to achieve material success and attaining a standard of living not possible or available in their homelands.

### 1. Patterns of Assimilation

Assimilation is a continuum one travels through, from arrival or birth in a new country to departure or death. Each individual's progress along the continuum can be influenced by many different factors including educational attainment, language aptitude, economic status, place of residence, career choice and personality. Another crucial factor in the speed and intensity with which one becomes assimilated is the pressure to assimilate which is exerted by the culture one is entering.

Acceptance of cultural differences is on the increase within the American culture. While this cultural acceptance may be in part due to a general attitude of greater cultural tolerance, there is no doubt that the increasing population of minority groups has, by their sheer size, forced the balance of the population to acknowledge and address cultural differences.

Because of the size and importance of the U.S. Hispanic market, it is imperative that marketers gain an understanding of how Hispanics are assimilating. Questions about the ways in which Hispanics are adapting to the American culture as consumers require answers. Assimilation patterns are of considerable consequence to marketers who need to determine the long term viability of marketing efforts directed to Hispanic consumers. If Hispanics are found to be assimilating rapidly into American culture, and adapting the media and buying habits of non-Hispanic consumers, then specific marketing programs addressed to Hispanics will not be needed in the long run. All that would be needed is for marketers to "wait out" the normal assimilation process, relying on the same marketing efforts aimed at the general market to influence Hispanic consumers.

Manifestations of assimilation are numerous and diverse. Assimilation can be determined using behavioral, attitudinal and aspirational measures. Some of the manifestations of assimilation include:

- The degree to which an individual has adapted to the language of the host country, regardless of their retained facility of their mother tongue,
- The degree of participation in culturally specific religious, social and professional institutions,
- The adaptation of the lifestyles, foods, products and media in use of the host culture,
- The length of time living in the host country,
- One's age at the time of immigration,
- The degree to which the individual's home, neighborhood, and workplace environments are culturally diverse and/or accepting of cultural diversity,
- Educational and career attainment prior to and during residence in the adopted country,
- The level of desire of, or aspiration for, involvement in the mainstream culture for oneself and one's children.

All of the above factors and more can be considered when attempting to measure assimilation. During the past several years, Strategy Research has evaluated numerous factors with which to segment the Hispanic population on the basis of assimilation.

## 2. Assimilation Among U.S. Hispanics

In our efforts to develop an assimilation model which could be used among Hispanics, we continuously measure responses to numerous different items. Some of the items used were selected based on our judgement that they were of such importance to assimilation that they must have a role in the process. Other items less directly related to assimilation were also included to see if they had a role in assimilation or were merely manifestations of other items or factors. The following are some of the items we included in our efforts to develop an assimilation model:

- First language spoken,
- Language spoken most frequently at home, at work, on social occasions and at school (for children),
- Spanish and English language proficiency in speaking, writing and reading,
- Language most comfortable speaking,
- Language preferred for religious services,
- The degree to which one's favorite sports, entertainment and TV personalities are Hispanic or Non-Hispanic,
- Country of birth,
- Length of residence in the U.S.,
- Age at time of immigration,
- Educational achievement,
- Occupation,
- Media Usage,
- Cultural diversity of respondent's neighborhood,
- Cultural diversity of respondent's close friends,
- Cooking/Eating lifestyle,
- Hispanic self-identity, i.e., the degree to which the persons see themselves as Hispanic,
- The desire to become more or less Hispanic ten years in the future.

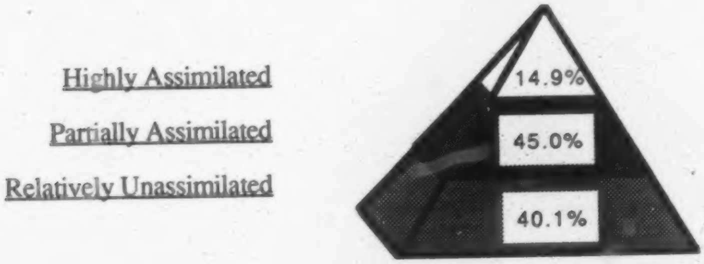
All of the data collected for these items were tested using a combination of clustering and factor analysis techniques. Three, five and six cluster solutions were reviewed. The items were reduced using factor analysis. In each case, the clusters and factors were combined and/or eliminated based on computation of r2 (coefficient of determination).

Ultimately, a model was developed using six factors weighted to their relative r2 value. This model allows for the creation of three basic assimilation groups: those who are Highly Assimilated, those Partially Assimilated, and those Relatively Unassimilated. Each basic group can be further divided into two sub-groups. These assimilation groups were arrayed and analyzed for logic, against all the results derived from the **1991 U.S. HISPANIC MARKET STUDY**.

We are now able to apply the model to all of our data and report on the varying assimilation patterns common to Hispanics from various countries of origin, among both adults and children/teens (6-17) and by regions of the U.S. In addition, we are able to report how attitudes, demographics, product and media use vary by major assimilation patterns.

In 1991, the bulk of U.S. Hispanics (85.1%) are only Partially Assimilated or Relatively Unassimilated. Only 15% of U.S. Hispanics are among the Highly Assimilated. The following illustration shows the assimilation pattern found today among U.S. Hispanics six years and older.

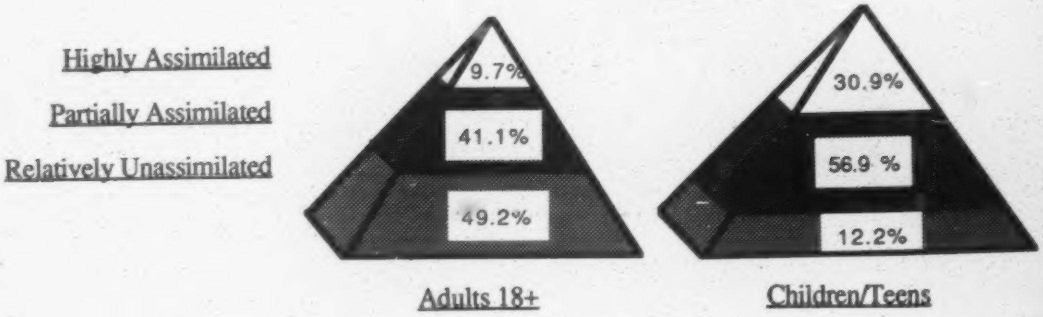
1991
U.S. Hispanic
Assimilation Groups



Using SRC's current model, the 1991 groups which very similar to the groups reported in the **1989 U.S. HISPANIC MARKET STUDY**.

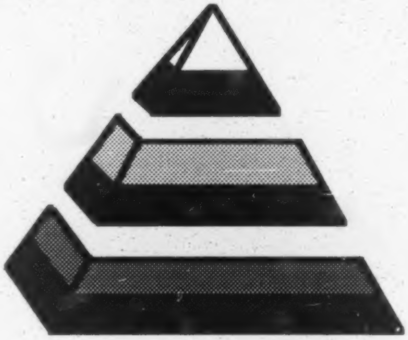
There are noticeable differences in assimilation patterns between children and adults. Children, as a group, are more assimilated than adults. This is not surprising considering their school environment, the interest in the "pop culture" typified by music groups and TV personalities, and the adaptability of youth.

1991
U.S. Hispanic
Assimilation Groups



The three basic assimilation groups can each be divided into two sub-groups. Use of these sub-groups will further accentuate differences in assimilation patterns. The following illustration shows the total Hispanic population (both adults and children/teens) divided into six groups and arrayed by degree of assimilation.

| | |
|---|---|
| 0-25 ° | 6.0% |
| 26-49 ° | 8.9 |
| Highly Assimilated | 14.9% |
| 50-69 ° | 19.5 |
| 70-84 ° | 25.5 |
| Partially Assimilated | 45.0% |
| 85-90 ° | 16.4 |
| 91-100 ° | 23.7 |
| Relatively Unassimilated | 40.1% |

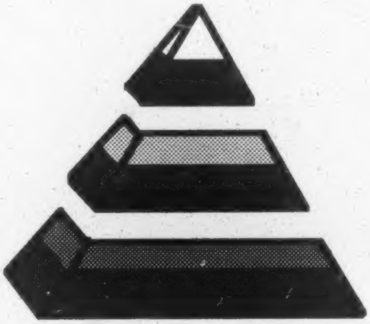


Degrees of Assimilation

Adults and children/teens can also be arrayed in six groups showing varying degrees of assimilation:

**ADULTS 18+**

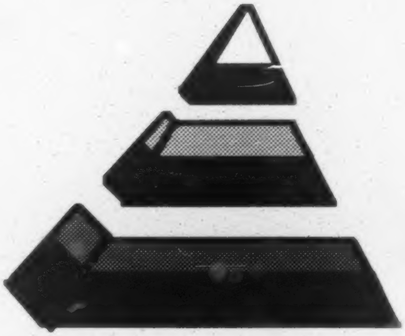
| | |
|---|---|
| 0-25 ° | 2.9% |
| 26-49 ° | 6.8 |
| Highly Assimilated | 9.7% |
| 50-69 ° | 15.5 |
| 70-84 ° | 25.6 |
| Partially Assimilated | 41.1% |
| 85-90 ° | 20.1 |
| 91-100 ° | 29.1 |
| Relatively Unassimilated | 49.2% |



Degrees of Assimilation

**CHILDREN/TEENS**

| | |
|---|---|
| 0-25 ° | 15.4% |
| 26-49 ° | 15.5 |
| Highly Assimilated | 30.9% |
| 50-69 ° | 31.4 |
| 70-84 ° | 25.5 |
| Partially Assimilated | 56.9% |
| 85-90 ° | 4.8 |
| 91-100 ° | 7.4 |
| Relatively Unassimilated | 12.2% |



Degrees of Assimilation

## 3. Assimilation Cross Tabulations

As has been mentioned, Strategy Research's assimilation groups can be used as crosstab banners and all of the **1991 U.S. HISPANIC MARKET STUDY** data can be computed and arrayed by these banners. As examples of this capability, the following will illustrate the assimilation patterns evident by region, by country of origin of the head of household and by the ethnicity of preferred celebrities.

### Assimilation Patterns By Region

Assimilation does vary by region. The most Assimilated Hispanics reside in the country's Southwest Region, principally, San Antonio, Albuquerque and Phoenix. The Southwest is home to many Mexican Americans who have lived in the United States for generations.

Relatively Unassimilated Hispanics are more prevalent in the Southeast and West Regions. In the Southeast, this can be attributed to the high density of Cuban-Americans, such as in Miami, where 63% of the population is Hispanic, and the fact that Cuban-Americans tend to be older than other Hispanic groups. The West Region on the other hand, continues to see considerable new immigration from Mexico and Central America. This would contribute to a greater presence of Relatively Unassimilated Hispanics.

The pattern of assimilation found among Hispanics in the Central Region is somewhat unique. This region has a disproportionately high level of the Partially Assimilated among its population and a relatively low proportion of the Highly Assimilated among its population.

**DEGREES OF ASSIMILATION**
**AMONG ALL HISPANIC**
**1991**

| | Total | North-east | South-east | South-west | Central | West |
|---|---|---|---|---|---|---|
| Highly Assimilated | 14.9% | 12.2% | 10.6% | 22.7% | 9.4% | 12.2% |
| Partially Assimilated | 45.0 | 48.8 | 30.1 | 53.3 | 54.1 | 40.0 |
| Relatively Unassimilated | 40.1 | 39.0 | 59.3 | 24.0 | 36.5 | 47.8 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## Assimilation Patterns By Gender

In the total U.S. Hispanic population, a slightly greater proportion of females are Highly Assimilated as compared to males. This slightly higher rate of assimilation among females can be traced to Children/Teens where females display a noticeably higher propensity to be Highly Assimilated. Among adults there is, in fact, very little differentiation between the assimilation patterns of males and females.

### DEGREES OF ASSIMILATION BY GENDER AMONG ALL HISPANIC 1991

| | Total Population | | All Adults | | Children/Teens | |
|---|---|---|---|---|---|---|
| | Male | Female | Males | Females | Male | Female |
| Highly Assimilated | 13.6% | 16.2% | 10.0% | 9.5% | 24.1% | 38.5% |
| Partially Assimilated | 46.3 | 44.2 | 40.2 | 42.5 | 63.9 | 49.9 |
| Relatively Unassimilated | 40.1 | 39.6 | 49.8 | 48.0 | 12.0 | 11.6 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## Assimilation Patterns By Country Of Origin

Differences in the assimilation pattern are also evident by the country of origin of heads of household. Mexican-American heads of household, as a group, are among the most assimilated of the U.S. Hispanic population. This relatively high rate of assimilation can be traced to the average number of Mexican Americans residing in the Southwest Region, and can be attributed to length of residence as pointed out on page 76.

Cuban and Central American heads of household display the least level of assimilation. The relative lack of assimilation among Cuban-American heads of household, as a group, can be attributed to several factors including an older average age, the high density of Hispanics in the Miami market, and possibly the tendency among most first generation Cuban-Americans to believe that they may one day return to their homeland.

The relatively low level of assimilation among Central American heads of household, however, is the result of the latest influx of new immigration among this segment.

### DEGREES OF ASSIMILATION AMONG ADULT HEADS OF HOUSEHOLD ACCORDING TO COUNTRY OF ORIGIN
### 1991

| | Mexican | Puerto Rico | Cuba | Central America | South America |
|---|---|---|---|---|---|
| Highly Assimilated | 13.4% | 9.6% | 3.8% | 3.1% | 9.7% |
| Partially Assimilated | 49.2 | 58.6 | 26.3 | 30.0 | 56.2 |
| Relatively Unassimilated | 37.4 | 31.8 | 69.9 | 66.9 | 34.1 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## Assimilation by Celebrity Preference

Hispanic heads of household were asked to identify their favorite entertainers and personalities from TV, and the sports world. The responses were then classified according to ethnicity, either Hispanic or Non-Hispanic. As the table below indicates, preference for Non-Hispanic celebrities increases with advancing rates of assimilation. Since large numbers of Central Americans are among the latest influx of new immigration, this could result in a relatively low level of assimilation among this group.

However, the influence of the Hispanic culture on the Highly Assimilated is very evident. Note that approximately 40% of respondents included an Hispanic among their favorite celebrities. But, the Relatively Unassimilated also show signs that acculturation occurs rather quickly, considering that 30% of this group included a Non-Hispanic among their favorite celebrities.

**ETHNICITY ACCORDING TO
FAVORITE PERSONALITIES/ENTERTAINERS
AMONG HISPANIC ADULT HEADS OF HOUSEHOLD
1991**

| | Highly Assimilated | Partially Assimilated | Relatively Unassimilated |
|---|---|---|---|
| Sports Personalities | | | |
| Hispanic | 37.0% | 66.4% | 81.1% |
| Non-Hispanic/American | 75.6 | 52.8 | 32.1 |
| No Favorite | 17.4 | 12.8 | 12.8 |
| Total | * | * | * |
| TV Personalities | | | |
| Hispanic | 41.4% | 72.6% | 88.9% |
| Non-Hispanic/American | 81.1 | 53.7 | 30.3 |
| No Favorite | 5.8 | 6.6 | 4.0 |
| Total | * | * | * |
| Entertainers | | | |
| Hispanic | 37.0% | 70.1% | 88.2% |
| Non-Hispanic/American | 72.7 | 51.8 | 30.8 |
| No Favorite | 10.1 | 10.8 | 5.3 |
| Total | * | * | * |

*Does not add to 100% due to multiple response.

Source: Strategy Research Corporation

The several examples cited above show the usefulness of the assimilation levels in a cross-tabulation analysis of data generated by the **1991 U.S. HISPANIC MARKET STUDY**. Further custom cross-tabulations of the assimilation data are available from Strategy Research Corporation.

## B. LANGUAGE PATTERNS

Language use is a measure of culture, or defined as, "the totality of socially transmitted behavior patterns, arts, beliefs, institutions, and all other products of human work and thought characteristic of a population." The strength and nature of linguistic practices is more a factor of the strength of the intent to maintain cultural and traditional beliefs than all other factors combined.

Regarding immigration, language represents a key factor in the acculturation, adaptation and eventual assimilation of arrivals to a new country. Because of its role in one's culture and traditions, the language patterns presented in this section of the report represent some of the most important findings of the **1991 U.S. HISPANIC MARKET STUDY**. Therefore, the following data provides critical insight to the U.S. Hispanic Market for all those seeking to serve it, to support it and to earn legitimate profit from it.

To provide this insight into the patterns of language use, Hispanics were asked a series of questions to determine:

- Their first language spoken,
- The language reported most comfortable to speak,
- The language spoken most frequently at home, work, school and social occasions,
- The degree to which Spanish is spoken, read and written,
- The degree to which English is spoken, read and written,
- The importance of the ability of children to read and write Spanish, and
- The importance of the ability of children to read and write English.

What follows is the results of those questions of the 1991 Survey of the Hispanic Population in the United States pertaining to language preference, use, and proficiency.

## 1. First Language Spoken

The first language spoken is usually preserved and maintained throughout one's lifetime. When developed fully enough, it can represent a cultural bond with a person's heritage.

Nearly all (96%) U.S. Hispanic adults presently living in the United States first learned to speak Spanish. This high incidence is shared in four of the five delineated U.S. Regions, the exception being the Southwest, where Spanish is still the prevailing first language spoken, but for 83% of Hispanics. Conversely, then, the incidence of English as the first spoken language is greatest in the Southwest Region where about one out of six (18%) Hispanic adults spoke English initially.

### FIRST LANGUAGE SPOKEN AMONG U.S. HISPANIC ADULTS
### 1991

| | Total | Northeast | Southeast | Central | Southwest | West |
|---|---|---|---|---|---|---|
| Spanish | 96.3% | 96.6% | 98.1% | 96.6% | 82.5% | 97.8% |
| English | 3.6 | 3.1 | 1.7 | 3.0 | 17.5 | 2.2 |
| Both | 0.1 | 0.3 | 0.2 | 0.4 | 0.0 | 0.0 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

Spanish is also the dominant first language spoken among U.S. Hispanic children. However, some regional differences do exist. Spanish was the first spoken language by most Hispanic children in the Northeast, the Southeast and the West. In the Central Region, approximately three-fourths of Hispanic children used Spanish first, but in the Southwest, only one-half spoke Spanish first.

### FIRST LANGUAGE SPOKEN AMONG U.S. HISPANIC CHILDREN
### 1991

| | Total | Northeast | Southeast | Central | Southwest | West |
|---|---|---|---|---|---|---|
| Spanish | 87.5% | 95.0% | 90.8% | 78.9% | 50.9% | 90.9% |
| English | 12.0 | 5.0 | 9.2 | 16.2 | 49.1 | 9.0 |
| Both | 0.5 | 0.0 | 0.0 | 4.9 | 0.0 | 0.1 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## 2. Most Comfortable Language

All persons have individual habits and preferences. Language is an area where those preferences are clearly shown. There are those, depending on the situation, who feel comfortable communicating better in one language rather than in another.

All adult U.S. Hispanic survey participants were asked to identify the language they feel most comfortable speaking. That is, they were asked, "When you add, subtract or divide numbers or when you are in a romantic situation, which language do you prefer to use?"

Nearly nine out of ten U.S. Hispanic adults report they are most comfortable speaking Spanish, while approximately 11% are most comfortable using English.

In the Southwest, Hispanic adults are more comfortable with Spanish (52%) than English (47%), but by only a slight margin. The highest incidence of comfort with speaking Spanish occurs in the West (92%).

**LANGUAGE MOST COMFORTABLE SPEAKING AMONG U.S. HISPANIC ADULTS**
**1991**

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Spanish | 87.2% | 86.4% | 88.4% | 85.4% | 52.4% | 92.4% |
| English | 11.4 | 13.5 | 11.4 | 12.8 | 46.9 | 5.4 |
| Both | 1.4 | 0.1 | 0.2 | 1.8 | 0.7 | 2.2 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

Being comfortable in the language one is speaking manifests itself in the satisfaction of communicating verbally, belief that we are understood and the assurance and confidence that comes with understanding the verbal communication of others.

U.S. Hispanic adults are generally comfortable with the Spanish language across the country. Hispanic adults are dominantly comfortable with the Spanish language in the West where the incidence of preference is over 90%. In the Southwest, Hispanic adults are nearly divided evenly between being comfortable with either the Spanish or English language.

The most comfortable language among U.S. Hispanic children is nearly equally divided among Spanish (46%) and English (44%), nationally. The incidence of Hispanic children that are most comfortable speaking Spanish is greatest in the West (58%) and Central (52%) Regions, and lowest in the Southwest (13%). The incidence of Hispanic children that are most comfortable speaking English is greatest in the Southwest (87%) and Southeast (73%), and lowest in the West (27%).

### LANGUAGE MOST COMFORTABLE SPEAKING AMONG U.S. HISPANIC CHILDREN

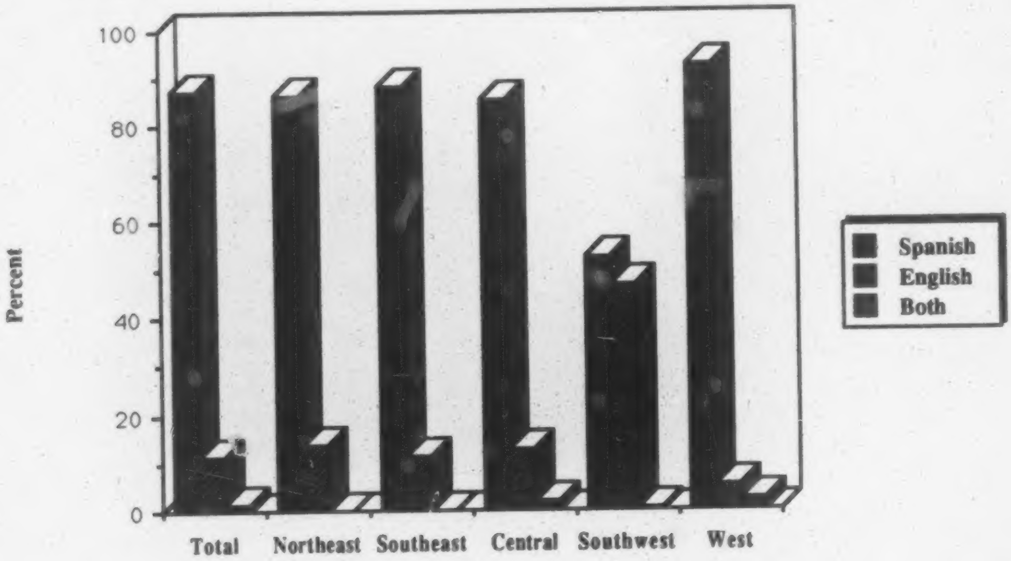
### 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Spanish | 46.4% | 34.6% | 26.6% | 51.6% | 13.1% | 58.0% |
| English | 44.2 | 65.4 | 73.4 | 38.6 | 86.9 | 26.6 |
| Both | 9.4 | 0.0 | 0.0 | 9.8 | 0.0 | 15.4 |
| TOTAL | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

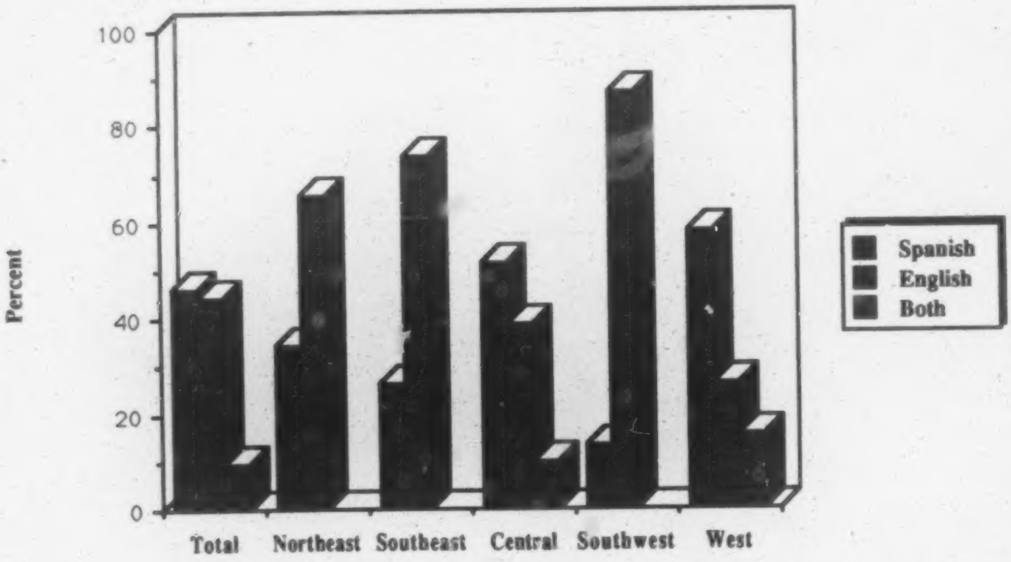
Source: Strategy Research Corporation

U.S. Hispanic children, while closely divided between being comfortable speaking both the Spanish and English language, are more polarized from region to region. Hispanic children in the Southwest, Southeast and Northeast regions appear to be twice to five times as comfortable speaking English. While Hispanic children in the West and Central regions appear more comfortable speaking Spanish. The most bilingual, or those Hispanic children that are comfortable speaking either Spanish or English, are located in the West.

Language Most Comfortable Speaking Among U.S. Hispanic Adults



Language Most Comfortable Speaking Among U.S. Hispanic Children



### 3. Frequency of Language Usage

Overall, U.S. Hispanic adults appear to be culturally bound to their heritage. Spanish is the primary language spoken by at least two-thirds of Hispanic adults at home and at social occasions. There is a greater use of the English language by Hispanic adults in the work environment than on other occasions.

**LANGUAGE MOST FREQUENTLY SPOKEN AMONG U.S. HISPANIC ADULTS 1991**

| Language Spoken | At Home | At Social Occasions | At Work |
|---|---|---|---|
| Spanish | 72.0% | 66.0% | 38.7% |
| English | 7.5 | 6.4 | 22.0 |
| Both | 20.5 | 27.6 | 39.3 |
| Total | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

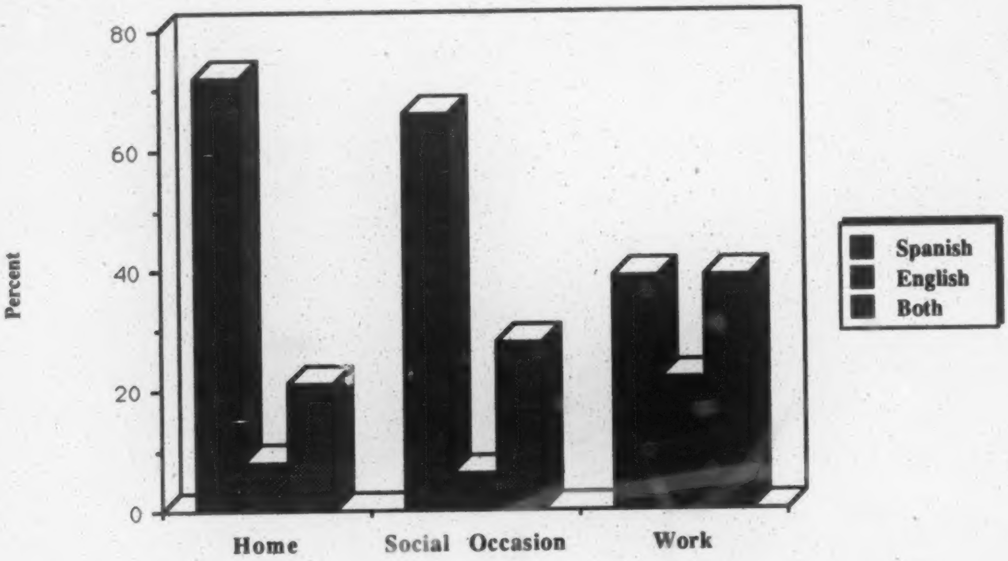
At home, Hispanic children speak Spanish four times more frequently than English. Both English and Spanish are spoken about evenly on social occasions by Hispanic children. English is the primary language spoken by over two-thirds of Hispanic children at school.

**LANGUAGE MOST FREQUENTLY SPOKEN AMONG U.S. HISPANIC CHILDREN 1991**

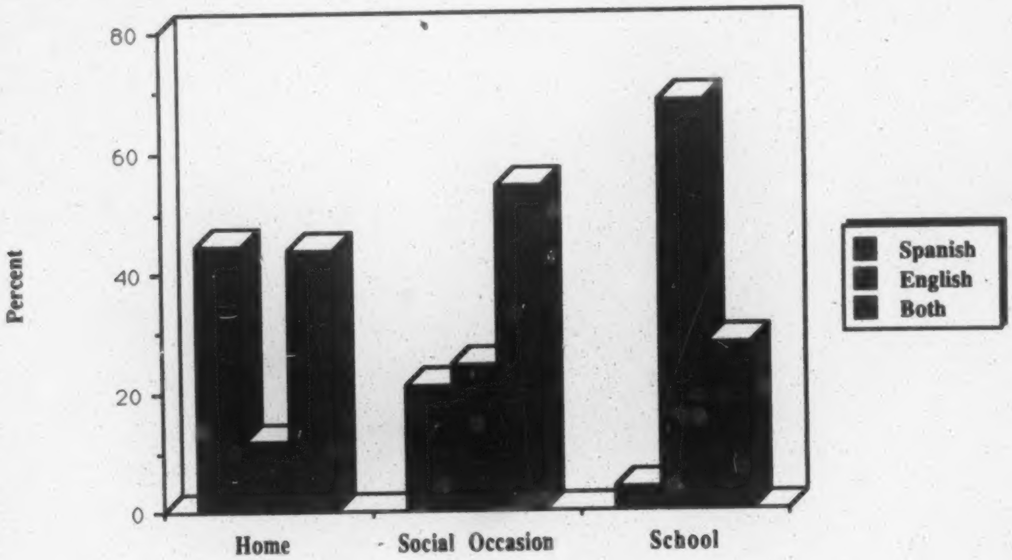
| Language Spoken | At Home | At Social Occasions | At School |
|---|---|---|---|
| Spanish | 44.7% | 21.3% | 3.9% |
| English | 11.6 | 24.5 | 68.2 |
| Both | 43.7 | 54.2 | 27.9 |
| Total | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## Language Most Frequently Spoken at Specific Times Among U.S. Hispanic Adults



## Language Most Frequently Spoken at Specific Times Among U.S. Hispanic Children



## Language Most Frequently Spoken According to Region

A clearer overview of the use of Spanish and English is available through a review of the responses of U.S. Hispanics when queried about the language spoken most frequently on specific occasions. These occasions include in the home, at work or at school, and on or at social occasions.

### Language Most Frequently Spoken at Home

Nearly three-fourths of Hispanics speak Spanish most often at home. The incidence of speaking Spanish at home among Hispanic adults was lowest in the Southwest, at 46%, and highest in the Southeast, as shown on the table below.

One out of five U.S. Hispanic adults speak English and Spanish at home. The greatest incidence of both languages being spoken by Hispanic adults is in the Southwest (38%) and the West (23%) Regions.

#### LANGUAGE SPOKEN MOST FREQUENTLY IN THE HOME AMONG U.S. HISPANIC ADULTS 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Spanish | 72.0% | 77.5% | 84.8% | 78.2% | 46.4% | 70.0% |
| English | 7.5 | 5.5 | 5.9 | 9.7 | 15.8 | 7.1 |
| Both | 20.5 | 17.0 | 9.3 | 12.1 | 37.8 | 22.9 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

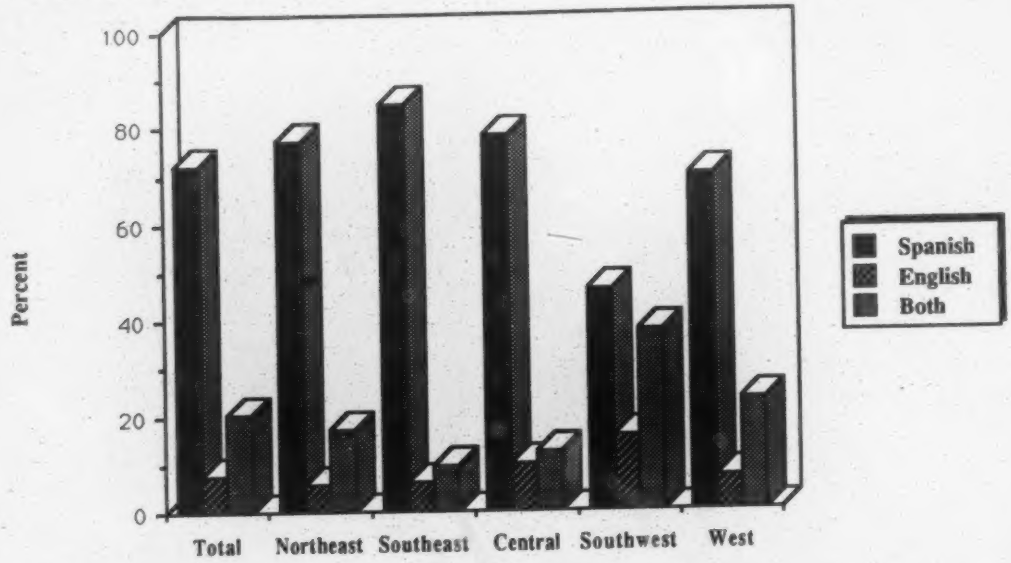
#### LANGUAGE SPOKEN MOST FREQUENTLY IN THE HOME AMONG U.S. HISPANIC CHILDREN 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Spanish | 44.7% | 55.6% | 56.4% | 68.2% | 15.2% | 41.2% |
| English | 11.6 | 8.1 | 14.9 | 10.9 | 37.9 | 7.7 |
| Both | 43.7 | 36.3 | 28.7 | 20.9 | 46.9 | 51.1 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

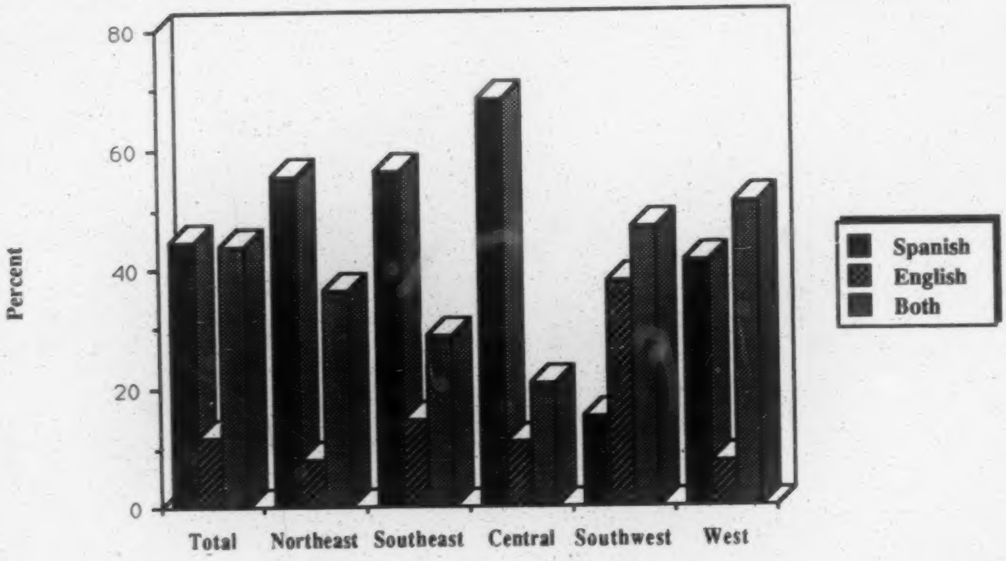
Source: Strategy Research Corporation

U.S. Hispanic children are as inclined to speak Spanish as they are to speak both Spanish and English in the home. The incidence of Hispanic children speaking Spanish most frequently in the home is greatest among Central Region Hispanics (68%), and lowest in the Southwest (15%). The incidence of Hispanic children speaking English most frequently in the home is greatest in the Southwest (38%). Hispanic children speaking both Spanish and English most frequently in the home has its greatest incidence in the West (51%) and Southwest (47%) Regions of the country.

**Language Spoken Most Frequently in The Home Among U.S. Hispanic Adults**



**Language Spoken Most Frequently in The Home Among U.S. Hispanic Children**



## Language Spoken on/at Social Occasions

Two-thirds of U.S. Hispanic adults speak Spanish most frequently at or on social occasions, while slightly over one-fourth use both Spanish and English at or for these occasions.

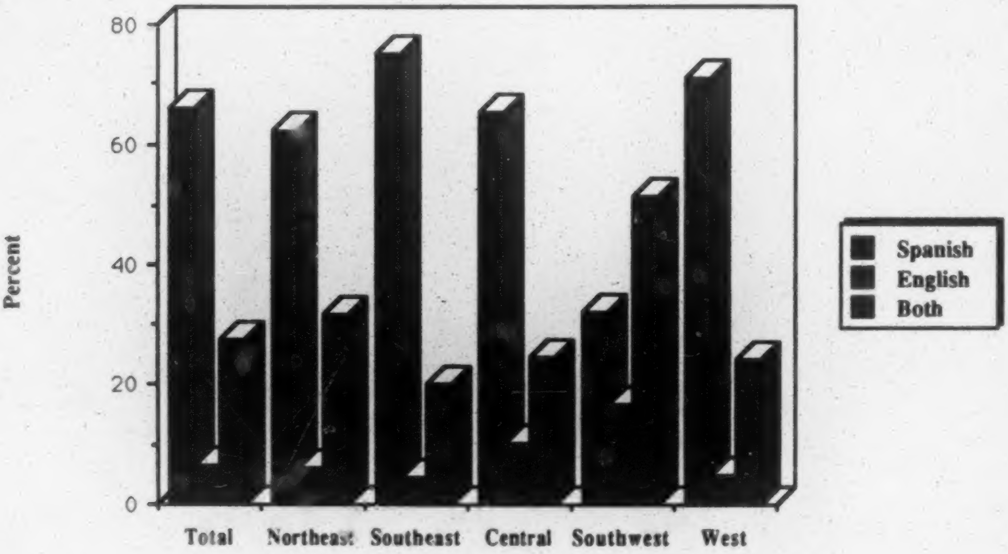
The incidence of Spanish usage as the language of choice by Hispanic adults at social occasions is greatest in the Southeast (75%) and West (70%) Regions. The use of both Spanish and English most frequently on social occasions is greatest in the Southwest where over one-half of Hispanic adults use both languages.

### LANGUAGE SPOKEN MOST FREQUENTLY ON SOCIAL OCCASIONS AMONG U.S. HISPANIC ADULTS 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Spanish | 66.0% | 62.2% | 75.2% | 65.1% | 32.2% | 70.8% |
| English | 6.4 | 6.2 | 4.7 | 10.2 | 16.5 | 4.9 |
| Both | 27.6 | 31.6 | 20.1 | 24.7 | 51.3 | 24.3 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

Language Spoken Most Frequently on Social Occasions Among U.S. Hispanic Adults



Over one-half of U.S. Hispanic children speak both Spanish and English most often on social occasions, while English is spoken most frequently on social occasions by only one-quarter of U.S. Hispanic children. Spanish is the language most frequently spoken on social occasions by about one out of five U.S. Hispanic children.

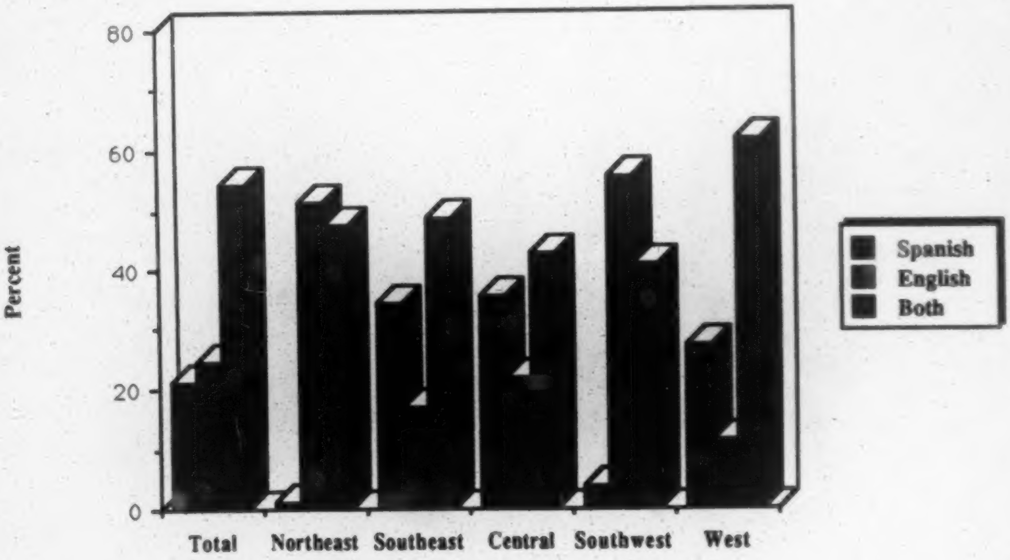
The incidence of English as the language spoken most frequently by Hispanic children on social occasions is greatest in the Southwest (56%) and Northeast (51%) Regions. Both Spanish and English are spoken equally by Hispanic children in the West (62%). Spanish is the language spoken the least by Hispanic children on social occasions in the Northeast and Southwest.

### LANGUAGE SPOKEN MOST FREQUENTLY ON SOCIAL OCCASIONS AMONG U.S. HISPANIC CHILDREN
### 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Spanish | 21.3% | 1.3% | 34.5% | 35.6% | 3.8% | 27.1% |
| English | 24.5 | 51.2 | 16.8 | 21.8 | 55.6 | 11.4 |
| Both | 54.2 | 47.5 | 48.7 | 42.6 | 40.6 | 61.5 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

**Language Spoken Most Frequently on Social Occasions Among U.S. Hispanic Children**



## Language Spoken Most Frequently at Work

U.S. Hispanic adults use Spanish (39%) and both Spanish and English about equally as the language most frequently spoken at work.

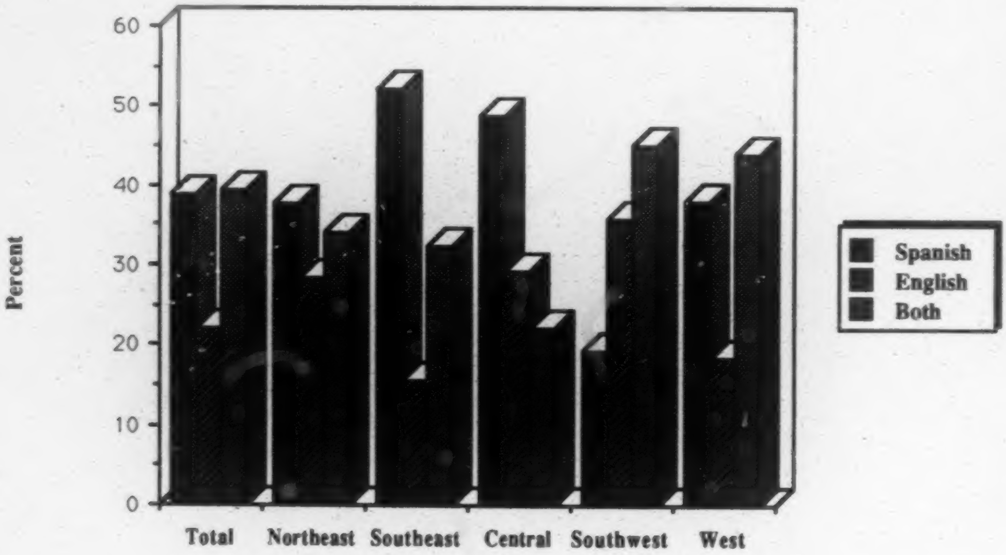
The incidence of Spanish as the language most often spoken at work is greatest in the Southeast (52%) and lowest in the Southwest (19%) Regions. The regions are reversed in the incidence of English as the language most often spoken by Hispanic adults at work; that is, it is highest in the Southwest (36%) and lowest in the Southeast (16%).

### LANGUAGE SPOKEN MOST FREQUENTLY AT WORK AMONG U.S. HISPANIC ADULTS
### 1991

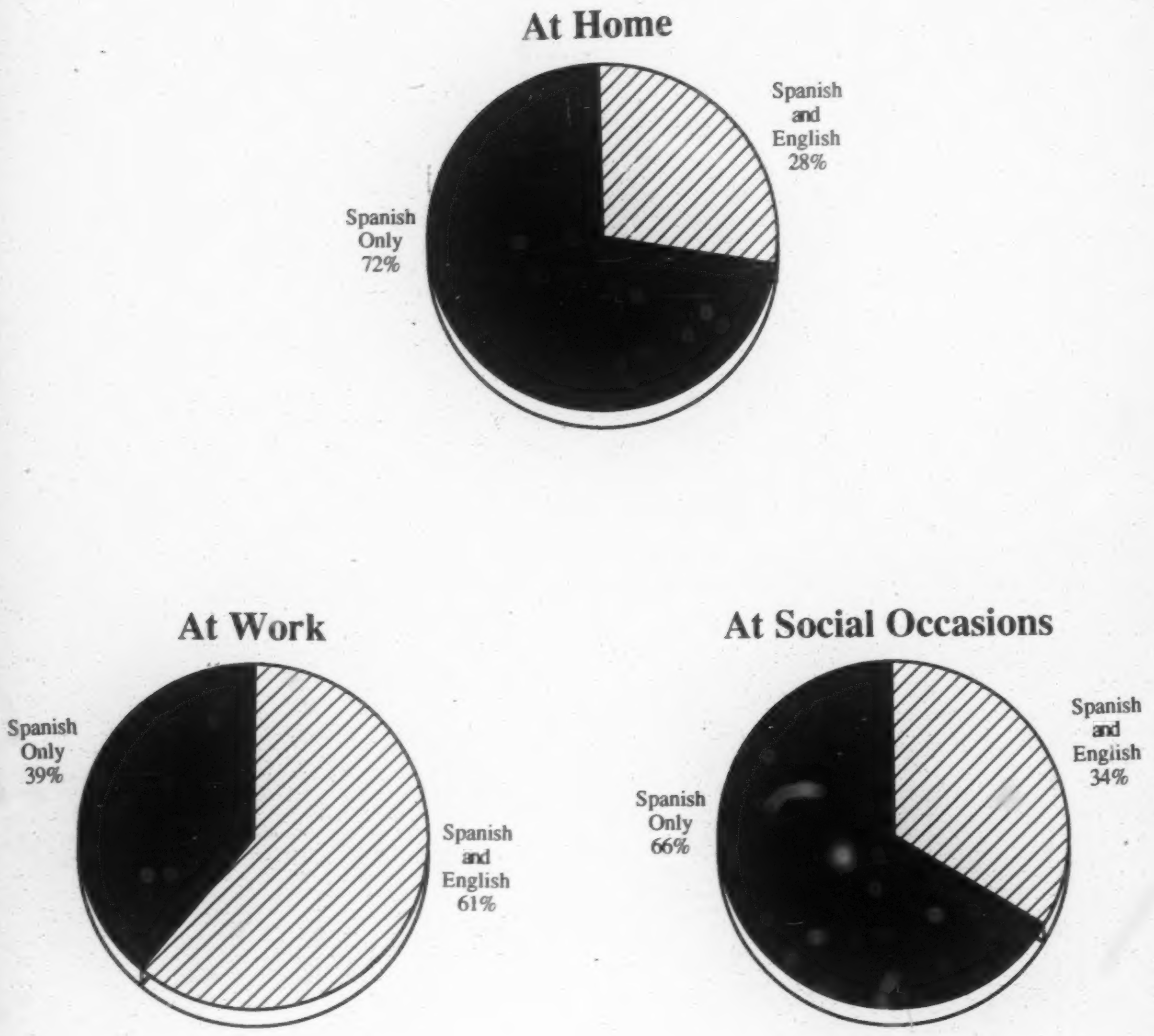
| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Spanish | 38.7% | 37.6% | 52.1% | 48.8% | 19.2% | 37.9% |
| English | 22.0 | 28.3 | 15.5 | 29.1 | 35.8 | 18.3 |
| Both | 39.3 | 34.1 | 32.4 | 22.1 | 45.0 | 43.8 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

**Language Spoken Most Frequently at Work Among U.S. Hispanic Adults**



# LANGUAGE SPOKEN AMONG U.S. HISPANIC ADULTS



## Language Spoken at School

English is the language most frequently spoken at school by better than two thirds of all U.S. Hispanic children ages 6 to 17, the age group of children to which all reference is made in this report, unless otherwise specified. However, it should also be noted that both Spanish and English are spoken most often by more than one-fourth of U.S. Hispanic children. The incidence is nearly the same for Hispanic children in both the six to eleven and twelve to seventeen year old age groups.

**LANGUAGE SPOKEN MOST FREQUENTLY AT SCHOOL AMONG U.S. HISPANIC TOTAL CHILDREN***
**1991**

| | | Age Group | |
|---|---|---|---|
| | Total | 6-11 | 12-17 |
| Spanish | 3.9% | 2.9% | 5.1% |
| English | 68.2 | 67.2 | 69.3 |
| Both | 27.9 | 29.9 | 25.6 |
| Total | 100.0% | 100.0% | 100.0% |

*Among children in school only.

Source: Strategy Research Corporation

The incidence of English as the language most frequently spoken by Hispanic children is greatest in the Southwest (91%). In this region (the Southwest), either Spanish or both Spanish and English are spoken the least by Hispanic children at school.

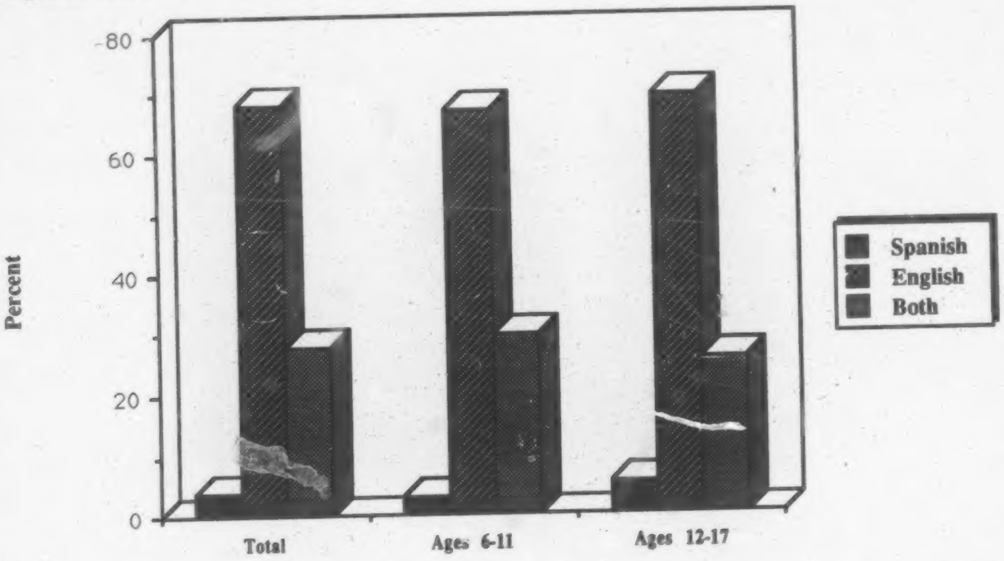
**LANGUAGE SPOKEN MOST FREQUENTLY AT SCHOOL AMONG U.S. HISPANIC CHILDREN AGES 6-17**
**1991**

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Spanish | 3.9% | 0.0% | 5.2% | 5.2% | 0.8% | 5.5% |
| English | 68.2 | 78.0 | 71.9 | 64.4 | 90.9 | 60.7 |
| Both | 27.9 | 22.0 | 22.9 | 30.4 | 8.3 | 33.8 |
| Total* | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

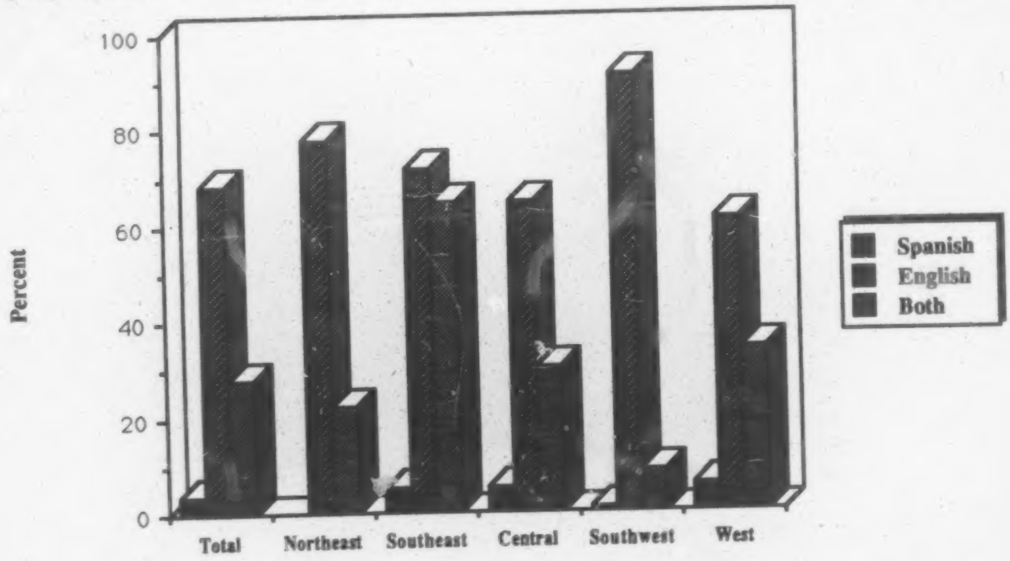
*Among children in school only.

Source: Strategy Research Corporation

## Language Spoken Most Frequently at School Among U.S. Hispanic Total Children



## Language Spoken Most Frequently at School Among U.S. Hispanic Children Ages 6-17



## 4. Language Skills

The following table details language skills among U.S. Hispanic adults. Hispanics were asked to evaluate themselves in terms of how well they speak, read and write both Spanish and English.

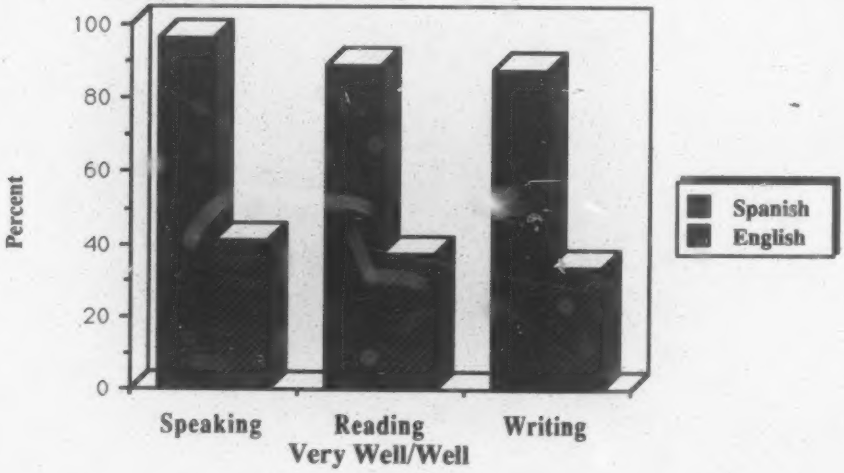
U.S. Hispanics are more fluent in speaking Spanish than in reading or writing the language. Nearly nine out of ten Hispanic adults speak, read and write Spanish with a great deal of proficiency, while the same can not be said for their proficiency with English. English speaking fluency (those who report speaking it well or very well) is higher among Hispanics than is their ability to read or write English "very well or well". Approximately two out of every ten Hispanics cannot speak, read or write English.

### SUMMARY OF LANGUAGE SKILLS AMONG U.S. HISPANIC ADULTS 1991

| | Very Well/ Well | Fair/Poor/ Very Poor | Can't Speak/ Read/Write |
|---|---|---|---|
| Fluency Of Speaking Spanish | 96.3% | 3.6% | 0.1% |
| Fluency Of Speaking English | 41.3 | 43.9 | 14.8 |
| Ability To Read Spanish | 88.9 | 9.2 | 1.9 |
| Ability To Read English | 37.2 | 43.3 | 19.5 |
| Proficiency In Writing Spanish | 87.3 | 10.4 | 2.3 |
| Proficiency In Writing English | 33.8 | 45.6 | 20.6 |

Source: Strategy Research Corporation

**Language Fluency Among U.S. Hispanic Adults**

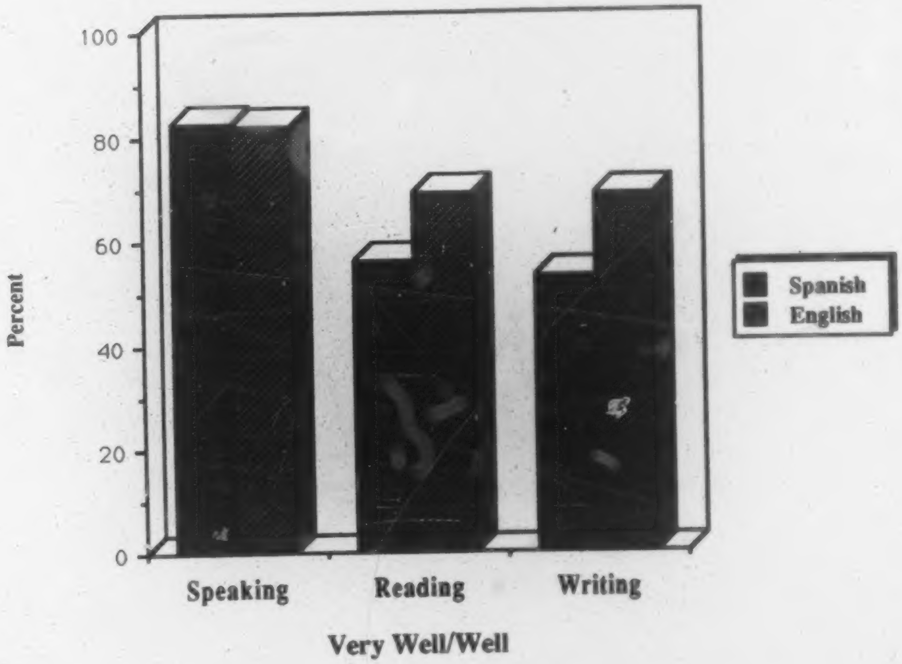


In contrast, eight out of every ten U.S. Hispanic children speak both English and Spanish with fluency. Over two-thirds of Hispanic children read and write English with a great deal of proficiency. However, just over one-half are proficient in reading and writing Spanish, while about one in ten can not read or write Spanish at all.

### SUMMARY OF LANGUAGE SKILLS AMONG U.S. HISPANIC CHILDREN
### 1991

| | Very Well/ Well | Fair/Poor/ Very Poor | Can't Speak/ Read/Write |
|---|---|---|---|
| Fluency Of Speaking Spanish | 82.4% | 15.4% | 2.2% |
| Fluency Of Speaking English | 82.2% | 16.3% | 1.5% |
| Ability To Read Spanish | 56.2% | 33.4% | 10.4% |
| Ability To Read English | 69.2% | 27.4% | 3.4% |
| Proficiency In Writing Spanish | 53.2% | 35.7% | 11.1% |
| Proficiency In Writing English | 68.5% | 28.2% | 3,3% |

Source: Strategy Research Corporation


**Language Fluency Among U.S. Hispanic Children**

## Speaking, Reading and Writing Spanish

Hispanic adults and children were asked about their current ability to speak, read and write Spanish. The survey respondents rated themselves on a six point rating scale. The rating options included: *very well, well, fair, poor, very poor* and *can't speak, read or write at all.*

### Speaking Spanish

U.S. Hispanic adults have managed to preserve and maintain fluency in Spanish in their daily lives. Over 95% of Hispanic adults report that they speak Spanish either "very well" or "well." However, in the Central and Southwest Regions of the country, only about five out of every six (86%) Hispanic adults report fluency (speak it very well or well) in speaking Spanish.

FLUENCY OF SPEAKING SPANISH
AMONG U.S. HISPANIC ADULTS
1991

| | Total | Northeast | Southeast | Central | Southwest | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 96.3% | 98.7% | 95.1% | 86.3% | 85.5% | 98.8% |
| Fair/Poor/Very Poor | 3.6 | 1.2 | 4.8 | 13.2 | 14.3 | 1.2 |
| Don't Speak Spanish | 0.1 | 0.1 | 0.1 | 0.5 | 0.2 | 0.0 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

As shown on the table on the next page, 82% of U.S. Hispanic children ages 6 to 17, reported that they were fluent in speaking Spanish. However, there were some dramatic differences in the range of fluency among the regions of the country. Fluency in Spanish among Hispanic children was strongest in the Northeast (93%) and West (89%) Regions. About two-thirds of Hispanic children in the Central and Southeast Regions are fluent in speaking Spanish. In the Southwest, slightly over one-half of Hispanic children report speaking Spanish "very well" or "well."

### FLUENCY OF SPEAKING SPANISH AMONG U.S. HISPANIC CHILDREN
### 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 82.4% | 93.2% | 61.4% | 66.5% | 51.9% | 89.4% |
| Fair/Poor/Very Poor | 15.4 | 6.7 | 38.5 | 32.2 | 28.1 | 10.4 |
| Don't Speak Spanish | 2.2 | 0.1 | 0.1 | 1.3 | 20.0 | 0.2 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## Reading Spanish

Overall, nearly nine out of ten U.S. Hispanic adults report the ability to read Spanish "very well" or "well."

This level of ability to read Spanish among U.S. Hispanic adults was strongest in the West (96%) and the Southeast (91%) Regions of the country. In the Northeast, 86% of Hispanic adults reported the ability to read Spanish at this high level, while 81% of the Hispanic adults in the Central Region reported a similar level of ability. However, only slightly over one-half of Hispanic adults in the Southwest report that they can read Spanish "very well" or "well."

### ABILITY TO READ SPANISH AMONG U.S. HISPANIC ADULTS
### 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 88.8% | 86.2% | 90.9% | 81.0% | 51.0% | 96.1% |
| Fair/Poor/Very Poor | 9.3 | 13.5 | 9.0 | 16.1 | 30.6 | 3.5 |
| Don't Read Spanish | 1.9 | 0.3 | 0.1 | 2.9 | 18.4 | 0.4 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

Approximately 56% of U.S. Hispanic children report that they can read Spanish "very well" or "well." In the West Region, over two-thirds of Hispanic children reported this level of proficiency in their ability to read Spanish. In the Southwest, only 11% of Hispanic children reported the ability to read Spanish "very well" or "well," while over 70% could not or do not read Spanish at all.

### ABILITY TO READ SPANISH AMONG U.S. HISPANIC CHILDREN 1991

| Ability to Read Spanish | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 56.2% | 55.0% | 47.1% | 50.0% | 10.5% | 67.1% |
| Fair/Poor/Very Poor | 33.4 | 41.2 | 51.6 | 37.6 | 19.3 | 30.2 |
| Don't Read Spanish | 10.4 | 3.8 | 1.3 | 12.4 | 70.2 | 2.7 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## Writing Spanish

Hispanic adults in the U.S. report about the same ability to read Spanish as the their proficiency to write Spanish. Nearly nine out of ten report the ability to read Spanish "very well" or "well," as shown on the following table.

Proficiency in writing Spanish among U.S. Hispanic adults was strongest in the West (95%) and the Southeast (91%) Regions of the country. Slightly under one-half of the Hispanic adults in the Southwest report they can write Spanish "very well" or "well."

### PROFICIENCY OF WRITING SPANISH AMONG U.S. HISPANIC ADULTS 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 87.3% | 83.2% | 90.6% | 80.1% | 46.7% | 95.2% |
| Fair/Poor/Very Poor | 10.4 | 16.5 | 9.4 | 15.8 | 31.1 | 4.3 |
| Don't Write Spanish | 2.3 | 0.3 | 0.0 | 4.1 | 22.2 | 0.5 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

U.S. Hispanic children report nearly the same level of proficiency (very well and well) in reading and writing Spanish (56% and 53%, respectively).

U.S. Hispanic children ages 6 to 17 report nearly the same level of proficiency (very well and well) in reading and writing Spanish (56% and 53%, respectively).

In the West, nearly two-thirds of Hispanic children report proficiency in the ability to write Spanish. In the Central, Northeast and Southeast Regions, less than one-half of Hispanic children report proficiency in writing Spanish. However, in the Southwest, only one out of six (13%) Hispanic children can write Spanish "very well" or "well," while over 70% don't write Spanish at all.

### REGIONAL COMPARISONS OF PROFICIENCY OF WRITING SPANISH AMONG U.S. HISPANIC CHILDREN 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 53.2% | 44.9% | 44.7% | 45.2% | 12.6% | 65.7% |
| Fair/Poor/Very Poor | 35.7 | 51.3 | 53.2 | 44.9 | 17.2 | 30.2 |
| Don't Write Spanish | 11.1 | 3.8 | 2.1 | 9.9 | 70.2 | 4.1 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## Summary

Proficiency in the verbal use of the Spanish language among Hispanic adults is at its highest level in the West, Northeast and Southeast Regions of the country, where levels exceed 95%. The incidence of proficiency in reading and writing Spanish among Hispanic adults rises above 95% only in the West Region.

Among Hispanic children ages 6 to 17, fluency in speaking Spanish is highest in the Northeast and West where the incidence is at or above the 90% level. Proficiency in reading and writing Spanish among Hispanic children is much lower, at about a two-thirds incidence in the West, while considerably lower in other regions of the country. The majority (70%) of Hispanic children in the Southwest do not read or write Spanish at all.

## English Language Skills By Region

Proficiency in speaking, reading and writing English was measured among Hispanic adults and children in the same manner as the ability to speak, read and write Spanish. Hispanics were asked to rate themselves on their ability to speak, read and write English by using a six point rating system (*very well, well, fair, poor, very poor, and can't speak, read or write English*).

### Speaking English

Approximately two out of five U.S. Hispanic adults (41%) speak English fluently, while nearly 15% can not speak English at all.

In the Southwest, nearly three-quarters of Hispanic adults report proficiency in speaking English, while one-half of the Hispanic adults in the Northeast report a similar language skill. Nearly as many (about one-third) Hispanic adults in the Southeast speak English with fluency as can not speak English at all.

### FLUENCY OF SPEAKING ENGLISH AMONG U.S. HISPANIC ADULTS 1991

| | Total | Northeast | Southeast | Central | Southwest | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 41.3% | 50.1% | 32.9% | 30.9% | 72.5% | 36.4% |
| Fair/Poor/Very Poor | 43.9 | 40.8 | 34.8 | 53.7 | 19.1 | 49.0 |
| Don't Speak English | 14.8 | 9.1 | 32.3 | 15.4 | 8.4 | 14.6 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

Fluency in English is much more prevalent among U.S. Hispanic children than it is among U.S. Hispanic adults. Over four out of five (82%) of U.S. Hispanic children speak English fluently ("very well"/"well").

In the Southwest, nearly all (97%) Hispanic children report speaking English "very well" or "well." In the Northeast, the incidence of speaking English proficiently among Hispanic children is close to 88%. However, only two-thirds (66%) of Hispanic children in the Central Region report the ability to speak English either "very well" or "well," These distributions are shown on the following table.

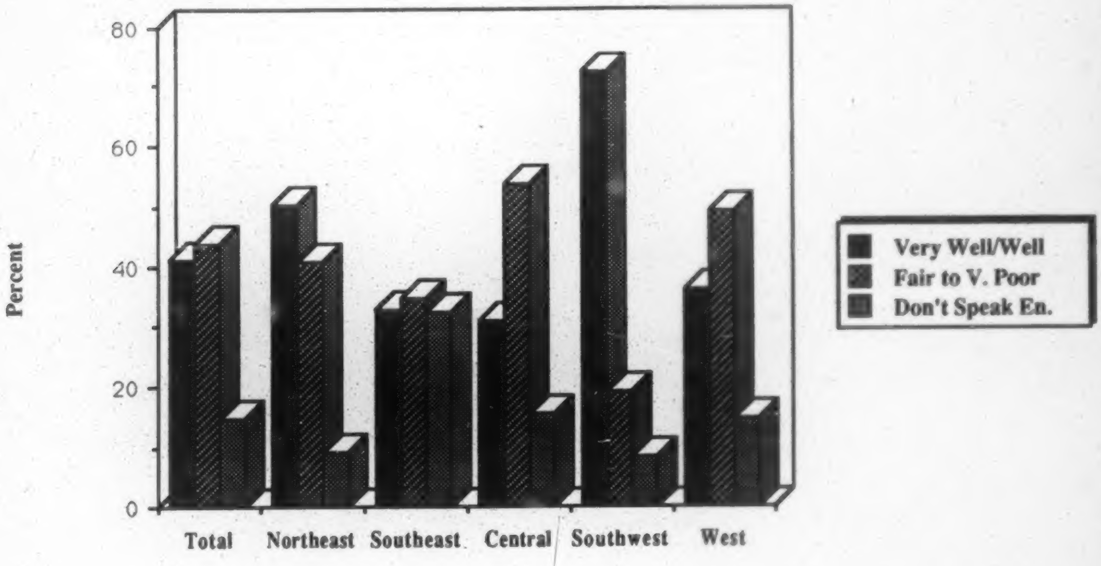
### FLUENCY OF SPEAKING ENGLISH AMONG U.S. HISPANIC CHILDREN

### 1991

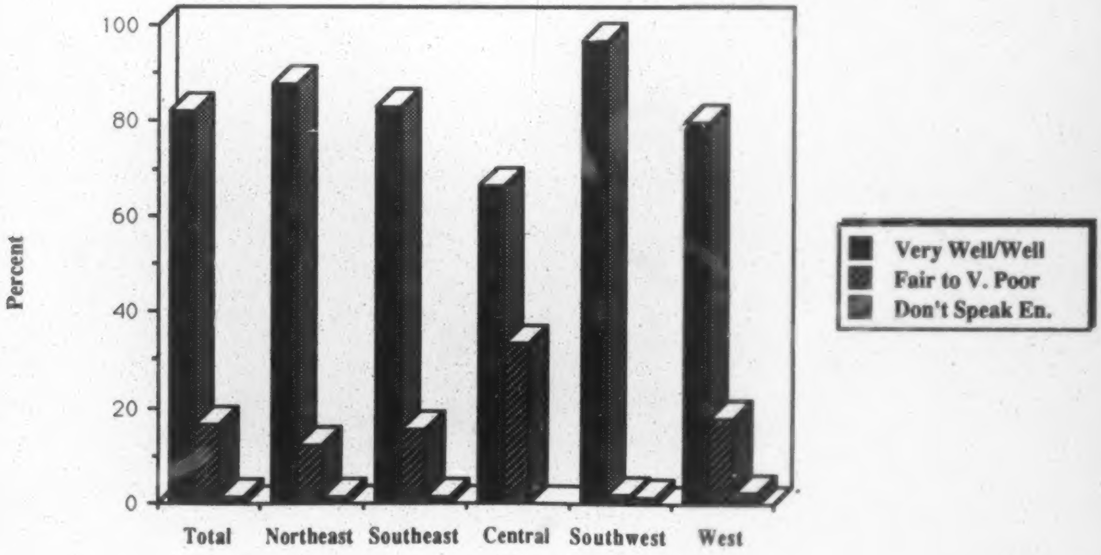
| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 82.2% | 87.9% | 83.0% | 66.4% | 96.8% | 79.9% |
| Fair/Poor/Very Poor | 16.3 | 12.1 | 15.7 | 33.6 | 2.0 | 17.7 |
| Don't Speak English | 1.5 | 0.0 | 1.3 | 0.0 | 1.2 | 2.4 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## Fluency of Speaking English Among U.S. Hispanic Adults



## Fluency of Speaking English Among U.S. Hispanic Children



## Reading English

As is the case with Spanish language use, proficiency of English language usage is reported to be higher for the spoken word than the written word among both Hispanic adults and children alike. Slightly over one-third of Hispanic adults read English either "very well" or "well."

Two-thirds of Hispanic adults in the Southwest report the ability to read English proficiently, a substantially higher level of proficiency than for any of the other U.S. Regions. The next highest level of proficiency for reading English is reported among Hispanics of the Northeast Region, approximately 43%, followed by close to one-third in the West and Southeast and 28% in the Central Region.

### REGIONAL COMPARISONS OF ENGLISH READING PROFICIENCY AMONG U.S. HISPANIC ADULTS
### 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 37.2% | 42.7% | 31.7% | 28.2% | 67.7% | 33.0% |
| Fair/Poor/Very Poor | 43.3 | 42.6 | 33.2 | 40.5 | 20.2 | 49.3 |
| Don't Read English | 19.5 | 14.7 | 35.1 | 31.3 | 12.1 | 17.7 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

Better than two-thirds of U.S. Hispanic children report that they are proficient in reading English or that they read English "very well" or "well." In the Southwest, nearly 85% of Hispanic children say they read English proficiently, while in the Southeast, slightly over three-quarters report a similar level of English reading skills.

### ENGLISH READING PROFICIENCY AMONG U.S. HISPANIC CHILDREN
### 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 69.2% | 69.8% | 78.0% | 64.1% | 84.9% | 66.0% |
| Fair/Poor/Very Poor | 27.4 | 30.2 | 20.7 | 32.4 | 9.3 | 29.7 |
| Don't Read English | 3.4 | 0.0 | 1.3 | 3.5 | 5.8 | 4.3 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## Writing English

One-third of all U.S. Hispanic adults report that they write English "very well" or "well," while one in five Hispanic adults can not write English at all.

In the Southwest, two-thirds of Hispanic adults indicate that they are proficient at writing English Southeast and Central Region Hispanic adults report the highest incidence of inability to write English at all, 37% and 32%, respectively.

### REGIONAL COMPARISONS OF ENGLISH WRITING PROFICIENCY AMONG U.S. HISPANIC ADULTS
### 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 33.8% | 32.4% | 31.0% | 26.7% | 66.3% | 31.2% |
| Fair/Poor/Very Poor | 45.6 | 52.2 | 31.6 | 41.7 | 19.4 | 50.0 |
| Don't Write English | 20.6 | 15.4 | 37.4 | 31.6 | 14.3 | 18.8 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

By contrast, slightly over two-thirds of all U.S. Hispanic children report that they write English either "very well" or "well," while less than 4% of U.S. Hispanic children can not write English at all.

The incidence of writing English with proficiency among Hispanic children is greatest in the Southwest (84%) and Southeast (83%) Regions.

### REGIONAL COMPARISONS OF PROFICIENCY OF WRITING ENGLISH AMONG U.S. HISPANIC CHILDREN 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Well/Well | 68.5% | 69.8% | 83.1% | 61.9% | 84.0% | 64.3% |
| Fair/Poor/Very Poor | 28.2 | 30.2 | 15.6 | 35.9 | 10.8 | 31.2 |
| Don't Write English | 3.3 | 0.0 | 1.3 | 2.2 | 5.2 | 4.5 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## Summary

Proficiency ("very well"/"well") in the verbal use of the English language among Hispanic adults is greatest in the Southwest Region of the country where the level approaches 75%. The incidence of proficiency in reading and writing English among Hispanic adults approximates two-thirds in the Southwest. About one-third of Hispanic adults in the Southeast can not speak, read or write the English language, while a similar portion of Hispanic adults in the Central Region, can not read or write English.

Fluency in speaking English among Hispanic children is highest in the Southwest where the incidence is above the 95% level. Proficiency in reading and writing English among Hispanic children is lower, at about a 84% to 85% incidence level, in the Southwest. About 5% to 6% of the Hispanic children in the Southwest can not read or write English at all.

## 5. Importance of Children Learning to Read and Write Spanish and English

U.S. Hispanic adults were asked about the importance of their children learning to read and write both Spanish and English perfectly. The results of this preference for the language literacy of Hispanic children by their parents is contained in the next two tables.

Overwhelmingly, U.S. Hispanic adults report that their children's ability to read and write both Spanish and English is "very important."

### IMPORTANCE OF CHILDREN HAVING THE ABILITY TO READ/WRITE SPANISH 1991

| | Total | Northeast | Southeast | Central | Southwest | West |
|---|---|---|---|---|---|---|
| Very /Somewhat Important | 97.2% | 99.4% | 100.0% | 97.0% | 97.6% | 95.3% |
| Neither Important Nor Unimportant | 2.5 | 0.3 | 0.0 | 3.0 | 1.3 | 4.7 |
| Not Very / Not At All Important | 0.3 | 0.3 | 0.0 | 0.0 | 1.1 | 0.0 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

A slightly higher portion of U.S. Hispanic adults reported that their children's ability to read and write English perfectly was "very important." Nearly 98% of Hispanic adults responded that this was "very" or "somewhat important," while regionally, the incidence ranged from 96% in the West, to 99% plus, in the Northeast, Southeast and Southwest.

## IMPORTANCE OF CHILDREN'S ABILITY TO READ/WRITE ENGLISH AMONG U.S. HISPANIC ADULTS
## 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very /Somewhat Important | 97.8% | 99.4% | 99.3% | 97.0% | 99.2% | 95.9% |
| Neither Important Nor Unimportant | 2.0 | 0.3 | 0.7 | 3.0 | 0.8 | 3.7 |
| Not Very /Not at All Important | 0.2 | 0.3 | 0.0 | 0.0 | 0.0 | 0.4 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## C. SOCIAL ATTITUDES

In order to better understand language use, assimilation and Hispanic attitudes, U.S. Hispanics were queried with regard to the environmental factors that surround their lives. The resultant data presented in this section will provide insight into some of the forces and perceptions that surround and shape Hispanic lifestyles.

The information presented in this sub-section of the report demonstrates the strength of the Hispanic culture and the pride in being Hispanic.

U.S. Hispanic adults and children were asked to evaluate and describe the degree of Hispanic orientation regarding their friends, their neighborhoods and themselves. Respondents were provided a scale upon which to identify or express the appropriate measurement of their perceptions, which was converted to the descriptive terminologies as shown on the table accompanying the following paragraphs.

### 1. Self Identification

Nine out of ten U.S. Hispanics (87%) described themselves as "Very Hispanic," while one out of ten (11%) rated themselves as being "Moderately Hispanic." Only 1% considered themselves to be "Minimally Hispanic."

The highest level of self-described Hispanic orientation among Hispanic adults is in the Northeast, where just over 90% consider themselves as "Very Hispanic." The lowest self-described Hispanic orientation occurred in the Southwest where 68% of Hispanic adults reported a self-described "Very Hispanic" orientation, and 28% reported a "Moderately Hispanic" orientation. Interestingly, just over 4% of Hispanic Adults in the Southwest considered themselves to be "Minimally Hispanic."

### SELF-DESCRIPTION OF HISPANIC ORIENTATION AMONG U.S. HISPANIC ADULTS
### 1991

| Degree of Hispanic Orientation | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Hispanic | 87.3% | 90.1% | 87.7% | 88.0% | 67.9% | 89.0% |
| Moderately Hispanic | 11.3 | 9.3 | 9.9 | 9.7 | 27.7 | 10.1 |
| Minimally Hispanic | 1.4 | 0.6 | 2.4 | 2.3 | 4.4 | 0.9 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

U.S Hispanic children were requested to rate themselves, regarding their perceived Hispanic orientation, on the same basis as were adults. Approximately two-thirds (67%) rated themselves as "Very Hispanic." This was about 20% lower than the incidence of Hispanic adults who identified themselves as "Very Hispanic." Better than one-fourth (28%) of Hispanic children rated themselves as "Moderately Hispanic," and the remaining 4% thought they were only "Minimally Hispanic."

The highest level of self-described "Very Hispanic" orientation was reported by West Region Hispanic children, where 81% described themselves as "Very Hispanic." Approximately 16% of this region's children described themselves as "Moderately Hispanic" in their ethnic orientation. The lowest self-described Hispanic orientation by Hispanic children were reported in the Northeast (46%), the Southeast (47%) and Southwest (47%) Regions. These distributions are presented on the following table.

## SELF-DESCRIPTION OF HISPANIC ORIENTATION AMONG U.S. HISPANIC CHILDREN 1991

| Degree of Hispanic Orientation | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Hispanic | 67.3% | 45.6% | 46.9% | 67.9% | 46.7% | 80.8% |
| Moderately Hispanic | 28.5 | 52.1 | 38.9 | 29.6 | 42.7 | 15.8 |
| Minimally Hispanic | 4.2 | 2.3 | 14.2 | 2.5 | 10.6 | 3.4 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## 2. Identification of Close Friends

U.S. Hispanic adults were asked to describe the Hispanic orientation or composition of their close friends. As shown on the table below, nearly four out of five (79%) Hispanic adults described their close friends composition as "Very Hispanic," while one out of five (20%) rated their close friends as "Moderately Hispanic." Less than 1% considered their close friends to be "Minimally Hispanic."

Almost nine of every ten Hispanic adults (87%) of the Southeast Region described their close friends as "Very Hispanic", the largest share of this category among the five regions. Hispanic adults in the West (85%) were similarly descriptive of their close friends. The region whose adults reported the least share of close friends being "Very Hispanic" was the Southwest, where only 57% so reported.

Almost 10% of the Central Region's Hispanic adults identified their close friends as only "Minimally Hispanic," the highest share of a "Minimally Hispanic" description among the five delineated regions. These distributions are shown on the following table.

**LEVEL OF HISPANIC ORIENTATION**
**OF CLOSE FRIENDS**
**AMONG U.S. HISPANIC ADULTS**
**1991**

| Degree of Hispanic Orientation | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Hispanic | 79.3% | 75.6% | 87.2% | 64.0% | 56.7% | 85.0% |
| Moderately Hispanic | 19.2 | 23.7 | 11.0 | 26.3 | 40.9 | 14.6 |
| Minimally Hispanic | 1.5 | 0.7 | 1.8 | 9.7 | 2.4 | 0.4 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

U.S Hispanic children rated their close friends on the same basis as did adults. The results of these ratings among children were considerably different than what Hispanic adults reported. As shown on the table below, less than three out of every five Hispanic children (57%) described their close friends composition as "Very Hispanic" (as compared with 80% by adults). Just over one-third (36%) rated their close friends as "Moderately Hispanic" oriented, and 7% described their close friends as only "Minimally Hispanic."

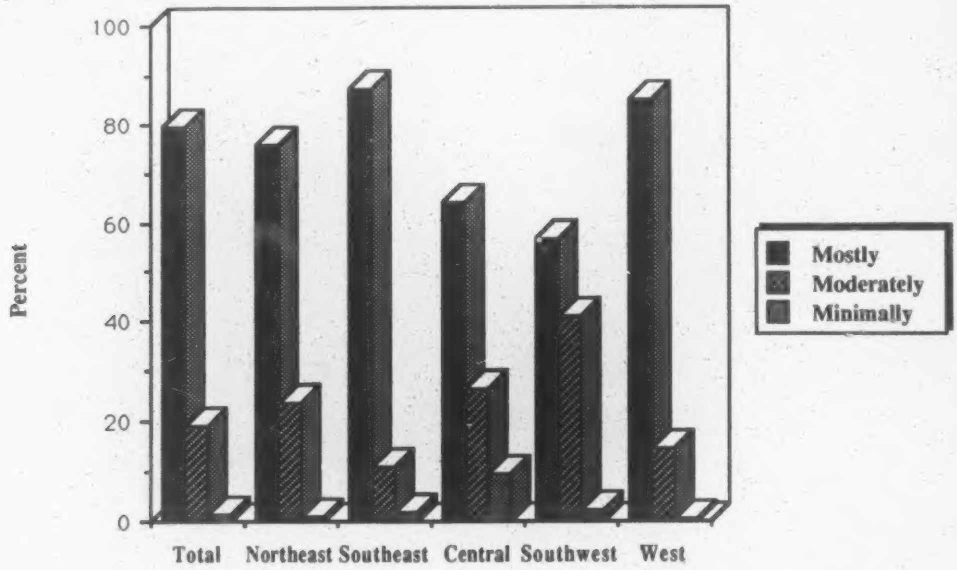
The highest incidence of "Very Hispanic" close friends reported among Hispanic children occurred in the West Region (72%), while the lowest incidence occurred among children in the Northeast (only 27%). Almost two-thirds (61%) of Hispanic children in the Northeast considered their close friends to be "Moderately Hispanic," and 12% identifed their close friends as "Minimally Hispanic." Children of the Southwest Region reflected similar observations about their friends, identifying 30% as "Very Hispanic," 58% as "Moderately Hispanic," and 13% "Minimally Hispanic." The distribution of responses among children in all five U.S. Regions are shown on the following table.

### LEVEL OF HISPANIC ORIENTATION OF CLOSE FRIENDS AMONG U.S. HISPANIC CHILDREN 1991

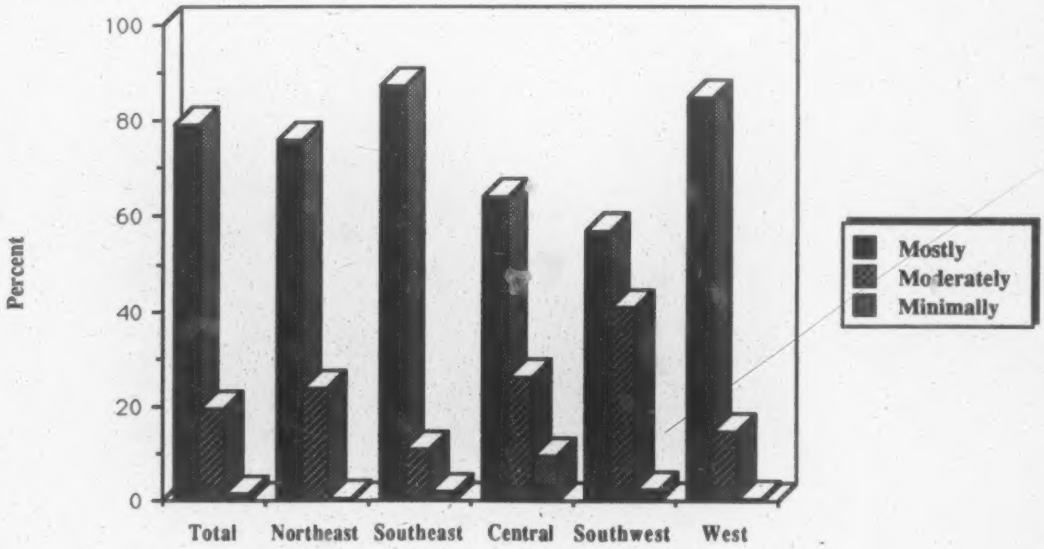
| Degree of Hispanic Orientation | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Hispanic | 56.9% | 27.4% | 58.9% | 54.6% | 29.7% | 71.7% |
| Moderately Hispanic | 36.2 | 60.5 | 30.4 | 35.6 | 57.5 | 25.1 |
| Minimally Hispanic | 6.9 | 12.1 | 10.7 | 9.8 | 12.8 | 3.2 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

**Level of Hispanic Orientation of Close Friends Among U.S. Hispanic Adults**



**Level of Hispanic Orientation of Close Friends Among U.S. Hispanic Children**



## 3. Neighborhood Composition

U.S. Hispanic adults were asked to describe the Hispanic orientation of their neighborhood. As shown on the table below, nearly two-thirds (66%) rated their neighborhoods as "Mostly Hispanic," 29% described the ethnic composition of their neighborhood as "Moderately Hispanic," and 5% said their neighborhood was "Minimally Hispanic."

As shown below, the highest level of neighborhood Hispanic orientation (84%) was reported by Hispanic adults in the Southeast. The next highest level was recorded among West Region Hispanic adults, 72% of whom also described their neighborhoods as "Mostly Hispanic." Neighborhoods with the least degree of "Mostly Hispanic" orientation (50%) were reported by Northeast Hispanics.

### DESCRIPTION OF HISPANIC ORIENTATION OF NEIGHBORHOOD AMONG U.S. HISPANIC ADULTS 1991

| Level of Hispanic Orientation | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Mostly Hispanic | 65.9% | 50.2% | 84.3% | 57.2% | 56.4% | 71.6% |
| Moderately Hispanic | 29.4 | 40.9 | 12.3 | 36.1 | 36.9 | 25.7 |
| Minimally Hispanic | 4.7 | 8.9 | 3.4 | 6.7 | 6.7 | 2.7 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

U.S Hispanic children were requested to rate their neighborhoods on the same basis as were adults. Although the responses of children were again indicative of a lower level of Hispanic orientation and association than that of adults, the perceptions of the two groups concerning this topic were much more similar, as could be expected. As shown below, approximately 60% of Hispanic children described their neighborhoods as "Mostly Hispanic," as compared with 66% for adults.

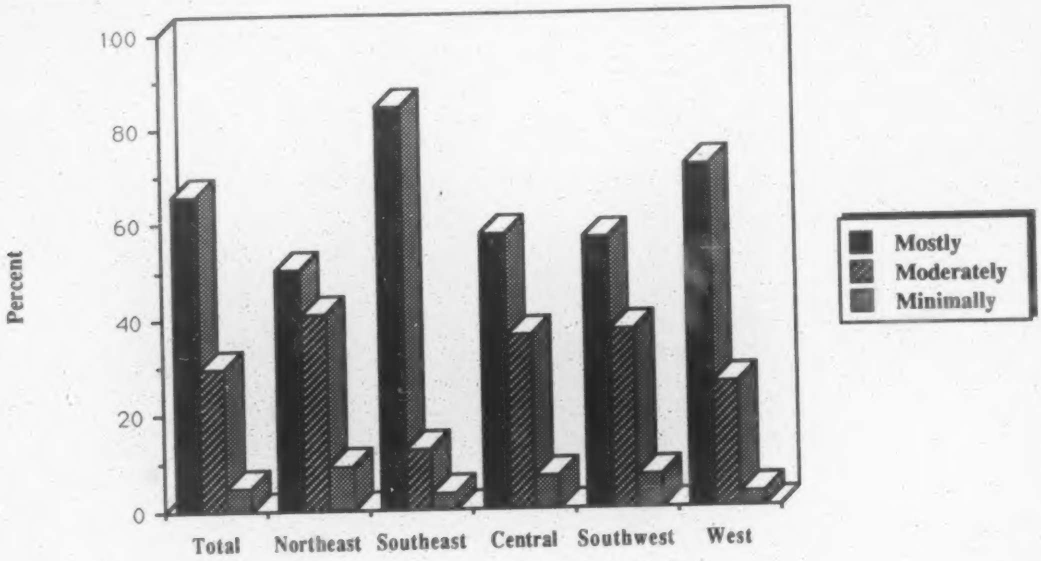
Regionally, the children's descriptions were also more reflective of the adult perceptions, with one exception. The exception occurred among Northeast children, of who only 27% perceived their neighborhoods as "Mostly Hispanic," as compared with 50% of the Northeast adult responses.

### DESCRIPTION OF HISPANIC ORIENTATION OF NEIGHBORHOOD AMONG U.S. HISPANIC CHILDREN
### 1991

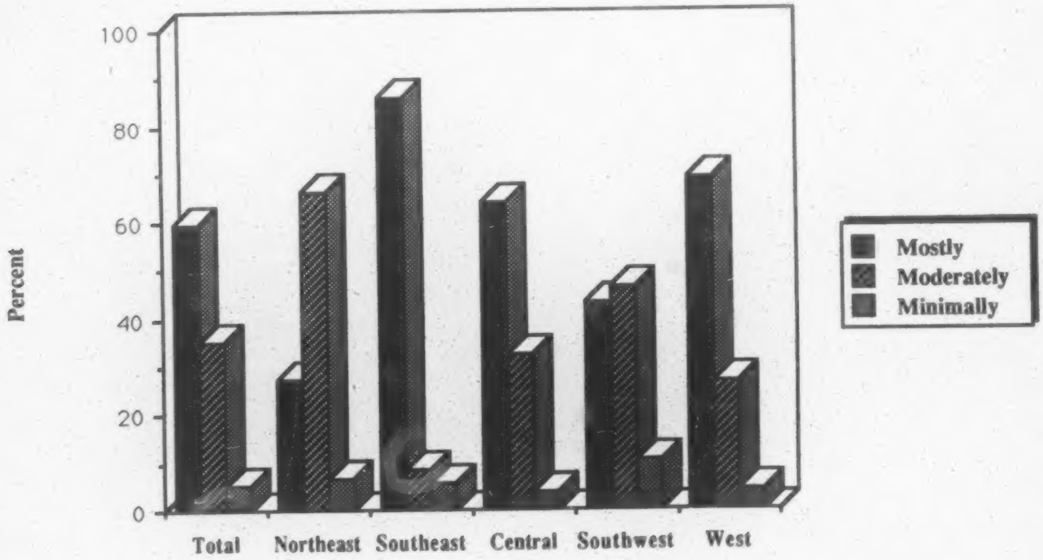
| Level of Hispanic Orientation | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Mostly Hispanic | 59.5% | 27.2% | 85.8% | 63.8% | 43.3% | 69.1% |
| Moderately Hispanic | 35.4 | 66.4 | 8.6 | 32.4 | 46.4 | 26.9 |
| Minimally Hispanic | 5.1 | 6.4 | 5.6 | 3.8 | 10.3 | 4.0 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

Description of Hispanic Orientation of Neighborhood Among U.S. Hispanic Adults



Description of Hispanic Orientation of Neighborhood Among U.S. Hispanic Children



## 4. Projection of Self Identification

U.S. Hispanic adults were asked to describe how Hispanic or Latin oriented they would like to be in ten (10) years. Overall, approximately eight out of ten (83%) reported they would like to be 90% or more Hispanic, which, for reporting purposes, is translated as "Very Hispanic." This projection is only slightly lower than the incidence of Adult Hispanics whose description of their **current** level of Hispanic orientation was "Very Hispanic." Thus, it is apparent that Hispanic adults, for the most part, have very little desire to or anticipation that they will, be less Hispanic ten years from now, than they consider themselves to be today. **This apparent resistance to assimilation must be noted by those seeking to market products and services to the U.S. Hispanic Market.**

The following table provides a comparison between Hispanic adults' self-description of their current Hispanic orientation, with the level of Hispanic orientation they anticipate for themselves in ten years.

### COMPARISON OF CURRENT AND PROJECTED SELF-DESCRIPTION OF HISPANIC ORIENTATION AMONG U.S. HISPANIC ADULTS
### 1991 - 2001

| Level of Hispanic Orientation | Current Orientation | Ten-Year Projection | Difference |
|---|---|---|---|
| Very Hispanic | 87.3% | 82.7% | -4.6 |
| Moderately Hispanic | 11.3 | 15.1 | 3.8 |
| Minimally Hispanic | 1.4 | 2.2 | 0.8 |
| Total | 100.0% | 100.0% | -- |

Source: Strategy Research Corporation

As shown on the following table, there are few distinctions among self-description projections regionally. The major difference occurs among Southwest Hispanic adults, nearly 23% of whom see themselves as being "Moderately Hispanic" in ten years, clearly the highest incidence of such feelings among the five regions. Likewise, Southwest residents report the highest incidence of "Minimal Hispanic" orientation in ten years (almost 10%, as compared with 4% currently).

## REGIONAL COMPARISONS OF CURRENT AND PROJECTED SELF-DESCRIPTION OF HISPANIC ORIENTATION AMONG U.S. HISPANIC ADULTS

## 1991 - 2001

| Level of Hispanic Orientation | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Hispanic | | | | | | |
| 1991 | 87.3% | 90.1% | 87.7% | 88.0% | 67.9% | 89.0% |
| 2001 | 82.7 | 83.8 | 83.4 | 80.9 | 67.6 | 84.4 |
| Difference | -4.6 | -6.3 | -4.3 | -7.1 | -0.3 | -4.6 |
| Moderately Hispanic | | | | | | |
| 1991 | 11.3 | 9.3 | 9.9 | 9.7 | 27.7 | 10.1 |
| 2001 | 15.1 | 15.0 | 14.1 | 15.5 | 22.7 | 14.2 |
| Difference | +3.8 | +5.7 | +4.2 | +5.8 | -5.0 | +4.1 |
| Minimally Hispanic | | | | | | |
| 1991 | 1.4 | 0.6 | 2.4 | 2.3 | 4.4 | 0.9 |
| 2001 | 2.2 | 1.2 | 2.5 | 3.6 | 9.7 | 1.4 |
| Difference | +0.8 | +0.6 | +0.1 | +1.3 | +5.3 | +0.5 |

Source: Strategy Research Corporation

U.S Hispanic children rated themselves on the same basis; how Hispanic would they like to be in ten (10) years. Generally speaking, children see themselves becoming less Hispanic ten years from now. Certainly, children see themselves becoming less Hispanic than adults see themselves becoming in the next ten years. While fewer Hispanic children see themselves as "Very Hispanic" and "Moderately Hispanic" in ten years, substantially more see themselves as "Minimally Hispanic" (4% versus 10%) ten year into the future.

### COMPARISON OF CURRENT AND PROJECTED SELF-DESCRIPTION OF HISPANIC ORIENTATION AMONG U.S. HISPANIC CHILDREN

### 1991 - 2001

| Level of Hispanic Orientation | Current Orientation | Ten-Year Projection | Difference |
|---|---|---|---|
| Very Hispanic | 67.3% | 65.7% | -1.6 |
| Moderately Hispanic | 28.5 | 24.6 | -3.9 |
| Minimally Hispanic | 4.2 | 9.7 | 5.5 |
| Total | 100.0% | 100.0% | -- |

Source: Strategy Research Corporation

Fewer Hispanic children in the Northeast, Southeast and Central Regions reported they were likely to be "Very Hispanic" ten years from now. The most significant declines would occur in the Northeast (46% versus 35%) and the Southeast (47% versus 40%). Slight gains were projected among children in the Southwest and West.

Conversely, the incidence of children becoming "Minimally Hispanic" in the Northeast by the year 2001, increased from the current perception of only 2%, to 19%. The increase of becoming "Minimally Hispanic" among Central Region children was from 3% to 10% and among children in the Southeast, from 14% to 19%.

### REGIONAL COMPARISONS OF CURRENT AND PROJECTED SELF-DESCRIPTION OF HISPANIC ORIENTATION AMONG U.S. HISPANIC CHILDREN

### 1991 - 2001

| Level of Hispanic Orientation | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Very Hispanic | | | | | | |
| 1991 | 67.3% | 45.6% | 46.9% | 67.9% | 46.7% | 80.8% |
| 2001 | 65.7 | 35.1 | 40.3 | 66.6 | 48.2 | 82.3 |
| Difference | -1.6 | -10.5 | -6.6 | -1.3 | +1.5 | +1.5 |
| Moderately Hispanic | | | | | | |
| 1991 | 28.5 | 52.1 | 38.9 | 29.6 | 42.7 | 15.8 |
| 2001 | 24.6 | 46.4 | 40.8 | 23.8 | 39.3 | 12.7 |
| Difference | -3.9 | -5.7 | +1.9 | -5.8 | -3.4 | -3.1 |
| Minimally Hispanic | | | | | | |
| 1991 | 4.2 | 2.3 | 14.2 | 2.5 | 10.6 | 3.4 |
| 2001 | 9.7 | 18.5 | 18.9 | 9.6 | 9.8. | 5.0 |
| Difference | +5.5 | +16.2 | +4.7 | +7.1 | -0.8 | +1.6 |

Source: Strategy Research Corporation

# VI

# SPANISH LANGUAGE MEDIA HABITS

## VI. SPANISH LANGUAGE MEDIA HABITS

How important is Hispanic Media to the marketing and advertising mix of products and services? This is the $64,000 question! Although there are a number of major advertisers and their advertising agencies who are reaping the rewards from advertising in Spanish, there are many more media executives who advocate that one can achieve sufficient coverage of the Hispanic market through their general market media plan. It is their contention that all Hispanics will soon assimilate and therefore it would be a waste to direct specific advertising dollars to this segment of the market . . . no need for Spanish language advertising and therefore no need for Spanish language media.

However, the assimilation patterns, language preferences, attitudes, all previously covered, prove that this theory can be put to rest once and for all. A truly effective media mix must include Spanish advertising.

As we have seen from the in-depth analysis on the previous pages, in about eleven years, the Hispanic market has grown by some 70%, reaching a total of almost 25 million people in 1991. And, no matter what their pattern of assimilation, **the language that they are most comfortable with is Spanish**. Eight out of ten Hispanic Adults reported that they were more comfortable with Spanish than English. Even among Hispanic Children and Teens, four out of ten reported that they were more comfortable with Spanish than English.

One can easily see by these language levels among Hispanic Adults, and to a large degree, Hispanic Children and Teens, that the basic language for information and entertainment is Spanish. This is verified by the high usage of all Spanish media. Today, Hispanics watch more, listen more and read more.

The media usage patterns discussed on the following pages are presented not to show any competitive advantage of one medium over another, but to emphasize the importance of utilizing Hispanic media in the media mix. The statistics reviewed and presented show that Hispanics rely on all forms of media for their news, information, education and entertainment, and in particular, Spanish language media.

The following pages will show how Hispanics use the media available to them, both Spanish and English. Keep in mind that Hispanics are not immuned to constant exposure by non-Hispanic media, as well as Spanish media, including television, radio, newspapers and magazines.

In conjunction with the growth of the Hispanic market, there has been an ever increasing number of Spanish broadcast and print media to service this segment of the population.

Looking back over the past ten years, television growth has been phenomenal. From the first Spanish Network, SIN, with 21 station affiliates and approximately 200 cable systems, the television market has grown to three Spanish Networks, GALAVISION, TELEMUNDO and UNIVISION, with a combined total of over 75 station affiliates and more than 500 cable systems. In addition, there are an increasing number of independent Spanish Television Stations from across the Mexican border, serving markets in the United States.

Cable television has shown great strides in the last ten years. Today, cable penetration among Hispanic households is 35%. New Spanish language cable networks are being planned; HBO has provided their service in Spanish, other paid cable providers are considering to offer Spanish language service and, the three Spanish Networks are available to many Hispanic communities via cable. Cable has become a big part of the media mix

### 1991 CABLE TELEVISION PENETRATION AMONG MAJOR U.S. ADI'S

| Top 15 ADI's | Percent Hispanic Households with Cable |
|---|---|
| Los Angeles | 18% |
| New York | 30 |
| Miami | 44 |
| San Antonio | 47 |
| San Francisco | 51 |
| Chicago | 30 |
| Houston | 35 |
| McAllen-Brownsville | 45 |
| Albuquerque | 20 |
| El Paso | 22 |
| San Diego | 67 |
| Fresno | 43 |
| Dallas-Ft. Worth | 23 |
| Phoenix | 36 |
| Sacramento-Stockton-Modesto | 51 |
| Total U.S. Hispanic Households | 35% |

Source: Strategy Research Corporation

Radio stations, programmed in English and programmed in Spanish have also continued to grow rapidly. In less than ten years the number of radio stations programming in Spanish has gone from less than 100 AM/FM Stations to over 250 in the United States alone. This is not counting approximately 50 radio stations that originate in Mexico whose broadcasts can be heard in the United States. It would be naive to ignore the fact that Hispanics also listen to other formatted stations. Since music is a universal language, there is bound to be cross-over to non-Hispanic music stations. But for daily information and entertainment, one can be sure that Hispanics' primary involvement is with Spanish Radio.

Newspapers have experienced the least amount of growth among media sources in recent years. Most of the major Spanish language metropolitan dailies that existed ten years ago, still exist today. However, their circulation continues to increase. These newspapers, such as Diario Las Americas and El Nuevo Herald in Miami, El Diario/La Prensa and Noticias Del Mundo in New York, El Manana in Chicago, La Opinion, El Eco de Valle and Noticias Del Mundo in Los Angeles, along with a few other dailies in smaller markets, have dedicated their pages to servicing the Hispanic market.

There are also approximately 100 or more community newspapers providing local service to Hispanic areas within major cities. These newspapers are published once or twice a week and usually distributed door-to-door.

Hispanics also look to English language newspapers for news and information. In many cases, it could be because there are no Spanish language newspapers in their community or distribution of Spanish language newspapers in their communities is limited. The fact remains though, that overall, Hispanics in the United States do look at English language newspapers.

Regarding other print media, today there are sixteen national Spanish language magazines, with another 100 or so Spanish magazines that are either local, bilingual, business or rotogravure magazines. Because there are so many choices among the special interest English language magazines in the United States, Hispanics cannot help but be exposed to these publications. That is why we find a certain portion of Hispanics reading or browsing English language magazines. However, the national Spanish language magazines are growing in circulation and new Spanish special interest formats continue to appear on news stands and other types of outlets where magazines are sold.

## A. TELEVISION

With today's television, there are numerous more choices available to the public, both Hispanic and non-Hispanic. Television offers news, sports, variety, drama, romance, shopping, entertainment and education through multiple choices of commercial English and Spanish UHF and VHF Station Channels, PBS, and the additional choices of cable paid and non-paid channels. With so many choices, television viewing among Hispanics is increasing.

To find out the language in which Hispanics view/listen to television, we asked "On an average day, how much time do you spend watching Spanish (English) Television?" Overall, nine out of ten adults (86%) watch Spanish Television on an average day, as opposed to slightly under eight out of ten (75%) who watch English Television. Ninety percent of adults 35+ watch Spanish Television, as compared with only 75% who watching English Television.

In an effort to be more like their non-Hispanic peers, and due to language skills as has been presented in previous pages of this report, the majority (95%) of Hispanic Teenagers (12-17 years of age) watch English Television. However, more than 6 out of 10 Hispanic Teenagers also watch Spanish Television. Among Hispanic Children (6-11 years of age) a similar majority (96%) of them watch English Television. But, they too are exposed to Spanish Television, with 45% spending some time with Spanish Television.

On the other hand, time spent watching Spanish and English Television among Hispanics paints quite a different story. In spite of the fact that Hispanics watch both Spanish and English Television, the time spent with each medium among adults is almost two to one, respectively. Adults 18+ spend an average of 2.4 hours per day watching Spanish Television, as compared with only 1.3 hours per day watching English Television. Teenagers spend about the same amount of time watching, with an average of 1.3 hours per day with Spanish Television and 1.8 hours per day with English Television.

Hispanic Children spend most of their viewing time with English Television, averaging 1.8 hours per day and less than one hour (0.8) per day with Spanish Television.

It is important to note that the data presented here represents the average time spent watching television on an average day. The results do not correspond to Strategy Research's STAR ratings that measure "yesterday's" viewing. "Yesterday's" viewing among Hispanics will show different variances between Spanish and English language television.

Based on STAR data, one can see much wider variances of time spent viewing Spanish Television versus English Television during specific times of day (e.g. prime time).

## TELEVISION USAGE DURING AVERAGE DAY HISPANIC AGE GROUPS 1991

| | Percent Viewing | |
|---|---|---|
| Hispanics | Spanish Television | English Television |
| Total Adults 18+ | 86.4% | 75.0% |
| Adults 18-34 | 82.4 | 76.5 |
| Adults 35+ | 90.3 | 74.7 |
| Teens 12-17 | 61.8% | 95.1 |
| Children 6-11 | 45.2% | 95.5 |

Source: Strategy Research Corporation

## TELEVISION USAGE TIME SPENT VIEWING DURING AVERAGE DAY HISPANIC AGE GROUPS 1991

| | Average Hours per Day | |
|---|---|---|
| Hispanics | Spanish Television | English Television |
| Total Adults 18+ | 2.4 Hours | 1.3 Hours |
| Adults 18-34 | 2.2 | 1.3 |
| Adults 35+ | 2.7 | 1.3 |
| Teens 12-17 | 1.3 | 1.8 |
| Children 6-11 | 0.8 | 1.8 |

Source: Strategy Research Corporation

## B. RADIO

The choices for listeners of radio also continue to increase. Radio offers a full spectrum of entertainment, both in English and Spanish. Formats range from the Classics to Jazz, from Salsa to Rock 'n Roll, from News and Information to Sports Play-by-Play. Through the advanced technology of broadcasting, the public (Hispanic and Non-Hispanic) has been educated and exposed to many cultures and music styles. This, in turn, has caused them to cross-over and increase their variety of choices. Thus, the average number of stations listened to has increased, and the variety of formats they chose to listen to has increased. However, Hispanics will continue to depend on their Spanish language radio stations for daily information, news and companionship.

When asked "On an average day, how much time do you spend listening to Spanish (English) Radio?" over three-fourths of Hispanic Adults 18+ say they listen to Spanish Radio, while slightly over one-half report listening to English Radio. Hispanic Adults 18-34 are slightly below average in listening to Spanish Radio and above average in listening to English Radio. Among Hispanic Adults 35+, the opposite is true, with the amount of time they listen to Spanish Radio being above average, and to English Radio, being below average.

On the other hand, twice as many Hispanic Teenagers (12-17 years of age) listen to English Radio as opposed to Spanish Radio, with 84% listening to English Radio on an average day, and 40% listening to Spanish Radio on an average day.

Twice as many Hispanic Children (6-11 years of age) also listen to English Radio as compared with Spanish Radio. However, we find that less of them listen to English or Spanish Radio; 34% listen to Spanish Radio while 64% listen to English Radio.

Hispanic Adults spend approximately three hours per day listening to radio. However, their time spent listening to Spanish Radio is twice as much as it is listening to English Radio. Adults 18+ spend 2.0 hours per day with Spanish Radio and 1.2 hours per day with English Radio.

Hispanic Teenagers (12-17 years of age) on the other hand, also spend an average of three hours per day listening to Radio, but spend three times as much time with English Radio as they do with Spanish Radio. Hispanic Teenagers spend about one-half hour (0.6) on an average day listening to Spanish Radio, while spending two and one-half hours (2.4) listening to English Radio.

Hispanic Children (6-11 years of age) average only two hours a day with radio. Time spent listening to Spanish Radio is the same as their teenage counterparts, an average of 0.6 hours per day. However, time spent listening to English Radio is far less than teenagers. Hispanic Children only spend an average of 1.5 hours per day listening to English Radio, one-third less time than do Hispanic Teenagers.

## RADIO USAGE DURING AVERAGE DAY ACCORDING TO AGE GROUPS
## 1991

| | Percent Listening | |
|---|---|---|
| Hispanics | Spanish Radio | English Radio |
| Total Adults 18+ | 78.2% | 56.1% |
| Adults 18-34 | 75.2 | 61.3 |
| Adults 35+ | 81.2 | 50.7 |
| Teens 12-17 | 40.2% | 84.3% |
| Children 6-11 | 33.7% | 64.1% |

Source: Strategy Research Corporation

## RADIO USAGE TIME SPENT LISTENING DURING AVERAGE DAY ACCORDING TO AGE GROUPS
## 1991

| | Average Hours Per Day | |
|---|---|---|
| Hispanics | Spanish Radio | English Radio |
| Total Adults 18+ | 2.0 Hours | 1.2 Hours |
| Adults 18-34 | 1.8 | 1.4 |
| Adults 35+ | 2.2 | 1.0 |
| Teens 12-17 | 0.6 | 2.4 |
| Children 6-11 | 0.6 | 1.5 |

Source: Strategy Research Corporation

## C. NEWSPAPERS

Usage of both English and Spanish newspapers among Hispanic Adults is strong. When asked "On an average day, how much time do you spend reading or looking through a Spanish (English) Newspaper?," four out of ten Hispanic Adults report they read or look through a Spanish Newspaper and five out of ten say they read or look through an English Newspaper. The high number of Hispanics who look at English language newspapers is understandable considering the absence of major Spanish language newspapers in many cities throughout the United States (see media availability above.) Since many Hispanics do not have access to Spanish language newspapers, it stands to reason that they will turn to English language Newspapers for such information as, weather, sports, employment and housing opportunities.

As to time spent with newspapers, Adults 18+, (young or old) spend less than one hour a day reviewing (reading or looking through) newspapers, with .4 hours a day spent with Spanish Newspapers and 0.4 hours a day spent with English Newspapers.

### NEWSPAPER USAGE DURING AVERAGE DAY HISPANIC AGE GROUPS

### 1991

| | Percent Reading or Browsing | |
|---|---|---|
| Hispanics | Spanish Newspapers | English Newspapers |
| Total Adults 18+ | 39.6% | 47.3% |
| Adults 18-34 | 38.5 | 44.7 |
| Adults 35+ | 40.6 | 49.8 |
| Teens 12-17 | 12.1 | 25.3 |
| Children 6-11 | 4.8 | 11.2 |

Source: Strategy Research Corporation

## NEWSPAPER USAGE
## TIME SPENT READING/BROWSING
## DURING AVERAGE DAY
## HISPANIC AGE GROUPS
## 1991

| Hispanics | Average Hours Per Day<br>Spanish Newspapers | English Newspapers |
|---|---|---|
| Total Adults 18+ | 0.4 Hour | 0.4 Hour |
| Adults 18-34 | 0.3 | 0.4 |
| Adults 35+ | 0.4 | 0.4 |
| Teens 12-17 | 0.1 | 0.4 |
| Children 6-11 | 0.1 | 0.1 |

Source: Strategy Research Corporation

## D. MAGAZINES

Because most magazines are monthly publications, Hispanics were asked: "During an **average week**, how much time do you spend reading or looking through Spanish (English) Magazines?" Forty percent of Hispanic Adults review (read or look through) Spanish Magazines, and the same number (40%) review English Magazines. Among Hispanic Teenagers (12-17 years of age), only two out of ten (17%) review Spanish Magazines while four out of ten (36%) review English Magazines. One out of ten Children (6-11 years of age) review Spanish Magazines and three out of ten review English Magazines.

During an average week, adults spend an equal amount of time with Spanish and English Magazines. Almost one hour (0.7) per week is spent reviewing (reading or looking through) Spanish Magazines and the same amount of time (0.7) is spent reviewing English Magazines. Among Teenagers (12-17 years of age), more time is spent with English Magazines accounting for .9 hours per week while Spanish Magazines account for .3 hours per week. Children (6-11 years of age) spend 0.3 hours per week with Spanish Magazines but English Magazines account for slightly less than Teenagers at 0.7 hours per week.

The exposure to English language magazines among Hispanics is also understandable considering the proliferation of special interest English language magazines throughout the United States, available everywhere; in waiting rooms, beauty salons, airplanes, check-out lines and the like.

## MAGAZINE USAGE DURING AVERAGE WEEK HISPANIC AGE GROUPS
## 1991

|  | Percent Reading/Browsing |  |
|---|---|---|
| Hispanics | Spanish Magazines | English Magazines |
| Total Adults 18+ | 36.9% | 36.6% |
| Adults 18-34 | 36.3 | 37.7 |
| Adults 35+ | 37.4 | 35.7 |
| Teens 12-17 | 16.7 | 36.5 |
| Children 6-11 | 14.4 | 31.0 |

Source: Strategy Research Corporation

## MAGAZINE USAGE TIME SPENT READING/BROWSING DURING AVERAGE WEEK HISPANIC AGE GROUPS
## 1991

|  | Average Hours Per Week |  |
|---|---|---|
| Hispanics | Spanish Magazines | English Magazines |
| Total Adults 18+ | 0.7 Hours | 0.7 Hours |
| Adults 18-34 | 0.6 | 0.7 |
| Adults 35+ | 0.7 | 0.7 |
| Teens 12-17 | 0.3 | 0.9 |
| Children 6-11 | 0.3 | 0.7 |

Source: Strategy Research Corporation

# VII

# INCOME AND BUYING POWER

## VII. INCOME AND BUYING POWER

This section of the **1991 U.S. HISPANIC MARKET STUDY** presents the results of primary and secondary research conducted by Strategy Research Corporation to estimate current income levels of the U.S. Hispanic Market, as well as its buying power.

### A. HOUSEHOLD INCOME

The following table depicts the distribution of household income among U.S. Hispanics based on the results of the market survey conducted by Strategy Research for this study, and adjusted to reflect other primary and secondary research data, such as recorded cost of living changes, inflation, buying patterns and family and household size shifts among the Hispanic population. As shown below, the mean (average) household income (before taxes) of all U.S. Hispanic households in 1991 is an estimated $32,400.

Among the five delineated U.S. Regions, the Southeast reflects the highest mean income among Hispanic households, at $35,670. The West Region, which includes California, maintains the second highest mean or average income, at $33,100, followed by the Central Region, at $30,130, and the Southwest, at $28,100.

#### DISTRIBUTION OF INCOME CATEGORIES AMONG U.S. HISPANIC HOUSEHOLDS 1991

| | | U.S. Regions | | | | |
|---|---|---|---|---|---|---|
| Income Categories | Total | Northeast | Southeast | Southwest | Central | West |
| Under $10,000 | 10.3% | 13.8% | 12.4% | 15.1% | 7.8% | 5.4% |
| $10,000 - $24,999 | 41.1 | 40.2 | 32.3 | 39.2 | 66.1 | 41.2 |
| $25,000 - 49,999 | 39.2 | 39.4 | 41.7 | 40.4 | 23.5 | 40.1 |
| $50,000 - $74,999 | 5.2 | 5.3 | 9.6 | 2.2 | 1.4 | 6.7 |
| $75,000 - $99,999 | 3.2 | 1.3 | 3.6 | 1.8 | 0.4 | 5.1 |
| $100,000 And Over | 1.0 | 0.0 | 0.4 | 1.3 | 0.8 | 1.5 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Mean Household Income | $32,400 | $27,900 | $35,670 | $28,100 | $30,130 | $33,100 |
| Median Household Income | $28,890 | $24,300 | $31,690 | $24,270 | $24,980 | $29,460 |

Source: Strategy Research Corporation

The following table provides a comparison of median household incomes among U.S. Hispanics, according to their Hispanic origin. As noted, Cuban-Americans have the highest median household income among the various Hispanic groups ($36,300). The median household income for the "Other Hispanic" category, mostly comprising Central and South Americans, ranks second highest among the various Hispanic groups ($29,100), followed by Hispanics of Mexican origin, at $27,500, and Puerto Rican Hispanics, at $20,900.

## MEDIAN HISPANIC HOUSEHOLD INCOME BY TYPE OF HISPANIC ORIGIN

### 1980 - 1991

| | 1980 | 1985 | 1991 |
|---|---|---|---|
| Total United States | $19,917 | $28,400 | $38,000 |
| **Total U.S. Hispanic** | **$14,712** | **$19,900** | **$28,890** |
| Hispanic Origin | | | |
| Cuban | $18,245 | $24,400 | $36,300 |
| Other Hispanic, including Central and South American | 16,230 | 23,000 | 29,100 |
| Mexican | 14,765 | 20,200 | 27,500 |
| Puerto Rican | 10,734 | 14,200 | 20,900 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Based on U.S. regional distribution, median Hispanic household income is highest in the Southeast ($31,690), and lowest in the Southwest and Northeast Regions ($24,270 and $24,300, respectively). The second highest median income is maintained by Hispanic households in the Western Region of the U.S., at $29,460, followed by Central Region households, at $24,980.

## MEDIAN U.S. HISPANIC HOUSEHOLD INCOME BY MARKET REGION
## 1991

| | Median Family Income |
|---|---|
| **Total U.S. Hispanic** | **$28,980** |
| U.S. Regions | |
| Southeast | $31,690 |
| West | 29,460 |
| Central | 24,980 |
| Northeast | 24,300 |
| Southwest | 24,270 |

Source: Strategy Research Corporation

## B. REGIONAL HOUSEHOLD INCOME

Mean household income is defined as the "arithmetic average" household income. It is derived by adding the individual household income values and dividing that sum by the total number of households. Since mean household income is calculated in this fashion, the values tend to be higher than the corresponding medians (value of the mid-point of household income in an array of households), usually due to the presence of a small number of households with extremely high incomes.

U.S. Hispanic households maintained a mean income in 1979 of $16,019. The 1991 estimate of $32,400 reflects an increase during the approximate eleven-year period of better than 67%. These figures are reflected on the following table.

### MEAN HOUSEHOLD INCOME OF U.S. HISPANIC HOUSEHOLDS ACCORDING TO U.S. REGIONS 1979 - 1991

| | Mean Income | | | |
|---|---|---|---|---|
| | 1979 | 1985 | 1989 | 1991 |
| **Total U.S. Hispanic** | **$16,019** | **$25,837** | **$30,243** | **$32,400** |
| U.S. Regions | | | | |
| Southeast | 17,739 | 28,600 | 33,300 | 35,670 |
| West | 16,800 | 27,100 | 31,470 | 33,100 |
| Central | 16,623 | 26,800 | 31,140 | 30,130 |
| Southwest | 14,959 | 24,100 | 28,020 | 28,100 |
| Northeast | 13,891 | 22,400 | 26,040 | 27,900 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## C. U.S. HISPANIC BUYING POWER

Aggregate income includes components such as personal taxes (federal, state and local), non-tax payments (such as fines, fees, penalties) and personal contributions for social insurance and, savings by households from income. When these items are deducted, the remainder is considered as "**buying power**."

The following table presents a summary of U.S. Hispanic "**buying power**" estimates for 1991. The formula utilized for this data is based on information provided by "**Sales Management's Survey of Buying Power.**" As shown, the 6.9 million U.S. Hispanic Households will generate approximately $182 billion in buying power during 1991.

### BUYING POWER
### U.S. HISPANIC HOUSEHOLDS
### 1991

| U.S. Regions | Total Hispanic Households (million) | Mean Household Income | Buying Power (million) |
|---|---|---|---|
| **Total U.S. Hispanic** | **6,930.2** | **$32,400** | **$182,147.2** |
| U.S. Regions | | | |
| West | 2,570.2 | $ 33,100 | $ 72,312.6 |
| Southwest | 1,808.9 | 28,100 | 43,205.6 |
| Northeast | 1,232.7 | 27,900 | 29,233.5 |
| Southeast | 771.0 | 35,670 | 23,376.3 |
| Central | 547.4 | 30,130 | 14,019.2 |

**Source: Strategy Research Corporation**

Strategy Research Corporation estimates that total U.S. Hispanic "**buying power**" has reached approximately $182.1 billion for 1991, a 36% increase over the 1987 estimate of $134.1 billion.

### TOTAL AND REGIONAL BUYING POWER OF U.S. HISPANIC MARKET
### 1985 - 1991

| Market Region | 1985 (Billions) | 1987 (Billions) | 1991 (Billions) |
|---|---|---|---|
| **Total U.S. Hispanic** | $ 94.1 | $134.1 | $182.1 |
| U.S. Regions | | | |
| West | $ 36.7 | $ 52.3 | $ 72.3 |
| Southwest | 23.4 | 33.4 | 43.2 |
| Northeast | 14.7 | 20.9 | 29.2 |
| Southeast | 11.3 | 16.1 | 23.4 |
| Central | 8.0 | 11.4 | 14.0 |

Source: Strategy Research Corporation

# VIII

# PERSONAL FINANCE

# VIII. PERSONAL FINANCE

## A. CREDIT CARD OWNERSHIP

### 1. Incidence of Credit Card Application

Approximately 59% of all Hispanics have applied for one of the three major credit cards, Visa, Mastercard or American Express. Approximately 27% of all those who reported applying for a card requested a Visa Card. Among the major cards, Mastercard was second in requests, at 19% and American Express was third, with 13%.

In general, application for the major credit cards is highest in the Northeast and West Regions, and lowest in the Southwest.

**CREDIT CARDS APPLIED FOR**
**AMONG U.S. HISPANICS**
**199[illegible]**

| | Total | North-east | South-east | South-west | Central | West |
|---|---|---|---|---|---|---|
| Major Cards | | | | | | |
| Visa | 26.8% | 30.5% | 26.3% | 24.2% | 25.7% | 26.7% |
| Mastercard | 19.3 | 20.3 | 18.4 | 17.2 | 16.8 | 20.6 |
| American Express | 13.0 | 13.5 | 11.5 | 9.6 | 10.5 | 15.4 |
| **Sub-Total** | **59.1%** | **64.3%** | **56.2%** | **51.0%** | **53.0%** | **62.7%** |
| Other Cards | | | | | | |
| Department Store | 18.0% | 24.2% | 19.6% | 25.7% | 19.6% | 10.4% |
| Gasoline Company | 7.8 | 3.2 | 7.9 | 9.5 | 10.1 | 8.6 |
| Choice/Discover | 6.5 | 3.5 | 9.0 | 7.1 | 7.8 | 6.8 |
| Diners Club | 4.8 | 1.3 | 3.1 | 3.7 | 6.1 | 7.3 |
| Optima | 3.8 | 3.5 | 4.2 | 3.0 | 3.4 | 4.2 |
| **Sub-Total** | **40.9%** | **35.7%** | **43.8%** | **49.0%** | **47.0%** | **37.3%** |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## 2. Incidence of Card Ownership

Actual ownership of the three major credit cards (Visa, Mastercard and American Express) follows the same essential patterns as does the distribution of applications for these cards. In total, 26% of Hispanics have either a Visa, Mastercard, or American Express Card, in that order of incidence. Approximately 7% own other types of credit cards, such as department stores, gasoline companies, Choice/Discovery, etc. Approximately 67% of all Hispanics don't own any credit cards.

As noted on the table below, 20% of Hispanics own a Visa Card; just over 15% and 10%, respectively, own a Mastercard and an American Express Card. The Southeast and Northeast Regions report the highest levels of credit card ownership.

Regionally, Southeast Hispanics report the highest net incidence of ownership of the three major credit cards (38%), followed by those in the Northeast (29%) and the West (28%).

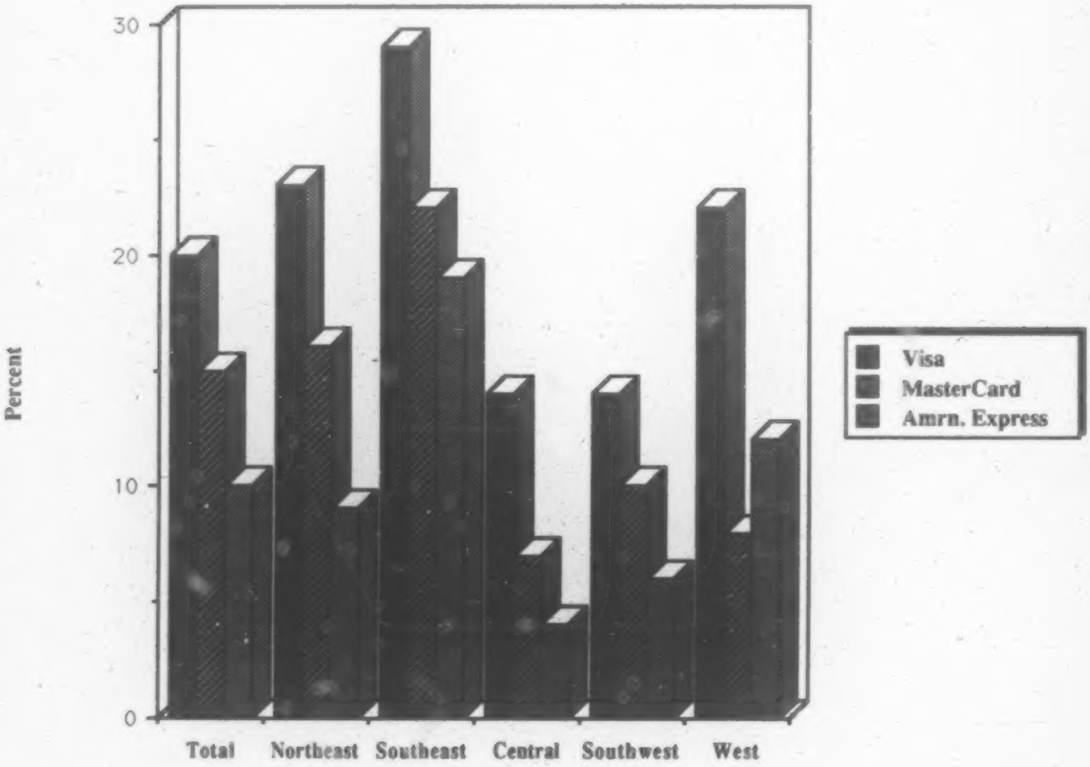
### CREDIT CARD OWNERSHIP AMONG U.S. HISPANICS 1991

| | Total | Northeast | Southeast | Central | Southwest | West |
|---|---|---|---|---|---|---|
| Major Cards | | | | | | |
| Visa | 20.2% | 23.3% | 28.7% | 13.7% | 14.3% | 22.1% |
| Mastercard | 15.2 | 16.4 | 21.8 | 7.0 | 9.8 | 8.1 |
| American Express | 10.2 | 8.9 | 18.9 | 4.0 | 6.4 | 12.2 |
| **Total*** | **45.6%** | **48.6%** | **69.4%** | **24.7%** | **30.5%** | **42.4%** |
| **Unduplicated Or Net Total!**** | **25.6%** | **28.5%** | **37.5%** | **16.1%** | **18.1%** | **28.3%** |
| **Other Cards** | **7.4** | **11.2** | **5.8** | **3.3** | **9.5** | **5.3** |
| **Own No Cards** | **67.0** | **72.4** | **56.7** | **80.6** | **72.4** | **66.4** |
| **Total** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** |

*Among major cards only.
**Own at least one American Express, Mastercard or Visa card.

Source: Strategy Research Corporation

## Credit Card Ownership Among Hispanics



# IX

# ACTIVITIES

## B. FINANCIAL SERVICES USAGE

### 1. Banking Services

More Hispanics have savings accounts than checking accounts. The higher propensity to savings accounts, as compared with checking accounts among Hispanics, is disproportionate to the general market, which has a much greater propensity toward checking accounts than to savings accounts.

Regionally, the greatest incidence of savings accounts was reported among Northeast Hispanics (58%), followed by Hispanics of the Southeast (52%). While checking account usage was generally lower than savings account usage among all Hispanics, Southeast Hispanics reported a greater incidence of checking than savings account usage (64% versus 58%). Moreover, checking account usage was highest among Southeast Hispanics by a substantial margin as compared with the other four regions. Hispanics of the West Region reported the next highest incidence, at 44%. The lowest incidence of checking account usage was among Central Hispanics (17%), who also reported the lowest incidence of savings account usage (32%).

INCIDENCE OF BANK ACCOUNTS
U.S. HISPANICS
1991

| Type of Account | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Savings Account | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Yes | 43.0% | 57.5% | 51.5% | 31.9% | 34.2% | 42.5% |
| No | 57.0 | 42.5 | 48.5 | 68.1 | 65.8 | 57.5 |
| Checking Account | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Yes | 39.0% | 35.5% | 63.5% | 17.1% | 29.2% | 44.3% |
| No | 61.0 | 64.5 | 36.5 | 82.9 | 70.8 | 55.7 |

Source: Strategy Research Corporation

## 2. Use of Other Financial Services

Less than 4% of all U.S. Hispanics report having other types of financial services. As shown on the following table, there is a greater level of usage for these types of services among the Central Region as compared with the other Regions of the country.

### INCIDENCE OF OTHER FINANCIAL SERVICES
### U.S. HISPANICS
### 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Certificates Of Deposit | 3.9% | 1.8% | 7.6% | 8.1% | 6.8% | 1.9% |
| Money Market Account | 2.0 | 1.4 | 2.3 | 7.5 | 2.0 | 1.7 |
| IRA/Keogh Account | 1.6 | 2.0 | 2.0 | 4.7 | 1.0 | 1.3 |
| Mutual Funds | 1.2 | 0.7 | 1.3 | 3.0 | 0.3 | 1.7 |
| Stock Investments | 1.1 | 0.3 | 2.0 | 3.7 | 0.5 | 1.2 |

Source: Strategy Research Corporation

# IX. ACTIVITIES

## A. TRAVEL HABITS

About one-half of all U.S. Hispanic households have at least one person who traveled at least 100 miles from home during the past year. Vacation and overseas travel was most prevalent among Hispanic households in the Southwest and Central regions. Travel by air was most prevalent in the Southeast (33%) followed by the Northeast and Central Regions, 29% and 28%, respectively.

Southeastern Hispanic households are more inclined toward a stay at a Hotel or Resort or taking a cruise than other regional Hispanics, while Hispanics in the Central Region are more inclined toward business travel.

### HOUSEHOLD TRAVEL DURING THE PAST YEAR AMONG U.S. HISPANICS 1991

| Travel Description | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Travelled At Least 100 Miles From Home | 49.8% | 55.1% | 48.2% | 45.5% | 48.8% | 49.3% |
| Vacation Travel | 27.5 | 25.6 | 25.1 | 35.8 | 29.5 | 26.4 |
| Overseas Travel | 25.6 | 14.1 | 22.5 | 34.4 | 31.5 | 25.8 |
| Travel By Air | 22.8 | 28.9 | 32.6 | 28.1 | 17.1 | 21.4 |
| Stayed Overnight At A Hotel | 15.1 | 11.1 | 23.1 | 16.7 | 14.9 | 14.9 |
| Stayed At A Resort | 9.7 | 7.2 | 19.2 | 6.0 | 5.0 | 12.2 |
| Business Travel | 5.6 | 2.3 | 6.5 | 11.4 | 8.2 | 4.3 |
| Has Gone Skiing | 2.8 | 3.3 | 2.3 | 2.7 | 2.1 | 3.2 |
| Has Taken A Cruise | 1.5 | 0.9 | 10.1 | 1.0 | 0.8 | 0.5 |

Source: Strategy Research Corporation

## B. VEHICLE RENTAL INCIDENCE

Overall, less than 5% of Hispanics rented a car, truck or van in the last year. Hispanics in the Northeast and Southeast were slightly more inclined to rent a vehicle during the past year than Hispanics as a whole.

### RENTAL OF CAR/TRUCK/VAN WITHIN THE PAST YEAR U.S. HISPANICS 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Rented Car/ Truck/Van | 4.6% | 5.9% | 6.5% | 1.7% | 4.6% | 4.2% |
| Did Not Rent Car/Truck/Van | 95.4 | 94.1 | 93.5 | 98.3 | 95.4 | 95.8 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## C. HOME REMODELING / DECORATING

Overall, less than 12% of Hispanics remodeled or decorated their homes in the past year. Hispanics in the Southwest and Central regions reported a slightly higher incidence of major remodeling or decorating during the past year than Hispanics in general.

### MAJOR REMODELING OR DECORATING OF HOUSEHOLD WITHIN THE PAST YEAR U.S. HISPANICS 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Have Remodeled/ Decorated In Past Year | 11.1% | 6.6% | 10.7% | 13.4% | 15.8% | 9.5% |
| Did Not Remodel/ Decorate In Past Year | 88.9 | 93.4 | 89.3 | 86.6 | 84.2 | 90.5 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

# X

# PRODUCT PURCHASING HABITS

## X. PRODUCT PURCHASING HABITS

This survey of Hispanic and Non-Hispanic households included a series of questions regarding household ownership of various items. This section reports the incidence of ownership of such items, the type of outlet where they were purchased and the average price paid for them.

## A. ATHLETIC SHOES

### 1. Incidence of Ownership

As shown on the table below, a slightly higher proportion of Hispanics (80%) than non-Hispanics (73%) report owning athletic shoes. Regionally, households in the West reported the highest incidence (90%) of athletic shoe ownership. Southeast Region households report the lowest incidence at 60.3%.

The West Region is characterized by a younger Hispanic population and different mix by country of origin compared to that of the Southeast Region, perhaps accounting for the considerable gap in the incidence of athletic shoe ownership between the two regions. In general, those Regions with higher populations of Mexican origin (West, Southwest and Central) reported a higher incidence of athletic shoe ownership.

The incidence of athletic shoe ownership among Hispanics suggests further exploration of the potential for sales of other sporting goods among this market segment. Participating in sports, as well as being spectators, plays an important role in the way of life of Hispanics. For many, attendance at entertainment/sporting activities was always difficult or limited by high costs/prices of such events, particularly in their countries of origin. Thus, for many, participation sports (baseball, soccer, etc.) has become and continues to be an important type of leisure time activity.

### HOUSEHOLD OWNERSHIP OF ATHLETIC SHOES AMONG HISPANICS AND NON-HISPANICS 1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Own Athletic Shoes | 80.3% | 70.8% | 60.3% | 83.9% | 76.7% | 90.1% | 73.3% |
| Don't Own Athletic Shoes | 19.7 | 29.2 | 39.7 | 16.1 | 23.3 | 9.9 | 26.7 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## 2. Store/Price of Most Recent Purchase

More than one-third (37%) of all Hispanic respondents made their most recent athletic shoe purchase in a shoe store. Department stores were the next most frequently mentioned outlet (22%), followed by athletic shoe stores (16%).

Regionally, regular shoe stores were the favored point-of-sale outlet in the Southwest, Central and West Regions; department stores were most popular among Hispanics in the Southeast and Northeast.

The average price paid by Hispanics for athletic shoes is $48. Central Region Hispanics report an average price of $58 which may correspond to the higher incidence of athletic shoes purchases at sporting goods stores. In contrast, Southwest Region Hispanics report the lowest average price paid ($42) and the second highest incidence of discount store purchase of athletic shoes. Non-Hispanics paid an average of $51 for athletic shoes, patronizing department stores (31%) and athletic shore stores (26%) most frequently.

**TYPE OF STORE WHERE LAST PAIR OF ATHLETIC SHOES WERE PURCHASED AND AVERAGE DOLLAR AMOUNT SPENT ON PURCHASE HISPANICS AND NON-HISPANICS**
**1991**

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| Place Of Purchase: | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Department Store | 21.8% | 34.8% | 38.3% | 10.0% | 25.4% | 14.9% | 31.4% |
| Discount Store | 13.5 | 20.8 | 7.0 | 4.8 | 14.1% | 12.8 | 8.7 |
| Shoe Store | 36.8 | 22.2 | 22.7 | 41.8 | 44.4 | 38.4 | 15.7 |
| Athletic Shoe Store | 16.0 | 11.6 | 22.2 | 18.7 | 11.3 | 18.9 | 26.4 |
| Sporting Goods Store | 8.2 | 6.0 | 6.5 | 20.7 | 2.0 | 10.9 | 13.0 |
| Other | 3.7 | 4.6 | 3.3 | 4.0 | 2.8 | 4.1 | 4.8 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Base | 80.3% | 70.8% | 60.3% | 83.9% | 76.7% | 90.1% | 73.3% |
| Average Dollars Spent: | $48 | $49 | $49 | $58 | $42 | $50 | $51 |

Source: Strategy Research Corporation

## B. TELEVISION SET OWNERSHIP

### 1. Incidence of Ownership

Television constitutes one of the main means of communication among Hispanics, as it does among non-Hispanics. While the large selection of Spanish-language television stations provides an important source of entertainment for Hispanics, it also represents an important link to Spanish language and customs in the household.

Almost all Hispanics (98%) report owning a television set. A similar level of incidence (97%) was reported among non-Hispanics. In the West, approximately 3% of Hispanic households do not own a television set, the highest such incidence among the five geographic regions.

HOUSEHOLD OWNERSHIP
OF A TELEVISION SET
AMONG HISPANICS AND NON-HISPANICS
1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Own a TV | 98.2% | 99.5% | 99.0% | 98.7% | 98.5% | 97.0% | 96.5% |
| Don't Own a TV | 1.8 | 0.5 | 1.0 | 1.3 | 1.5 | 3.0 | 3.5 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## 2. Most Recent Purchase

As shown on the following table, 69% of all U.S. Hispanic household television sets were purchased within the past three years, as compared with 55% among non-Hispanics. Interestingly, 83% of Hispanics in the West Region report purchasing a television set in the past three years, which dovetails with the fact that Hispanics in the West report the shortest average length of U.S. residence (11 years and two months as compared with the U.S. Hispanic average of 15 years and two months). The incidence of television sets three years old or less is much lower among Hispanics in the Northeast (55%) and the Southwest (58%).

### WHEN LAST TELEVISION SET WAS PURCHASED AMONG HISPANICS AND NON-HISPANICS 1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total | Northeast | Southeast | Central | Southwest | West | Non-Hispanic |
| Less Than 1 Year | 13.0% | 7.9% | 11.2% | 14.7% | 6.3% | 19.8% | 12.6% |
| 1 - 3 Years | 55.8 | 46.8 | 56.0 | 48.6 | 51.8 | 63.3 | 42.8 |
| **Sub-total** | **68.6%** | **54.7%** | **67.2%** | **63.3%** | **58.1%** | **83.1%** | **55.4%** |
| 4 Years Or More | 31.2 | 45.3 | 32.8 | 36.7 | 41.9 | 16.9 | 44.6 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Base | 98.2% | 99.5% | 99.0% | 98.7% | 98.5% | 97.0% | 96.5% |

Source: Strategy Research Corporation

## 3. Store/Price of Most Recent Purchase

Overall, a slightly larger percentage of Hispanics than non-Hispanics purchase television sets at department stores, appliance stores, and discount stores.

Department stores are the preferred point-of-purchase of television sets by U.S. Hispanics by a considerable margin, 42% versus 19% at appliance stores and 14% at discount stores. A similar pattern was reported by non-Hispanics, with the major differences being a higher incidence of patronage by non-Hispanics of electronic stores, and lower purchase frequencies at discount, appliance and department stores.

Regionally, Southwest and Northeast Hispanics report heaviest patronage of department stores for television set purchases (56% and 52%, respectively), while purchases of television sets at department store were lowest among Hispanics of the Central Region. At the same time, television set purchases at appliance stores were strongest by Hispanics in the West.

As far as pricing is concerned, Hispanics report paying an average of $396 for their most recent television set purchase, some $66 less than the $462 average price reported by non-Hispanics. The lowest price paid by U.S. Hispanics for television sets ($341) occurs in the West, commensurate with that Region's (highest) 22% incidence of discount store television purchase.

### STORE WHERE TELEVISION SET PURCHASED AND AVERAGE DOLLAR AMOUNT OF PURCHASE HISPANICS AND NON-HISPANICS

### 1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| Place Of Purchase: | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Department Store | 42.0% | 51.9% | 46.6% | 17.3% | 55.6% | 31.0% | 38.2% |
| Appliance Store | 19.2 | 18.0 | 5.3 | 26.1 | 12.2 | 26.6 | 17.8 |
| Discount Store | 14.1 | 3.3 | 3.0 | 4.1 | 14.9 | 21.6 | 10.4 |
| Electronic Store | 12.6 | 10.8 | 29.6 | 24.1 | 4.0 | 14.0 | 17.5 |
| Catalog | 1.1 | 0.3 | 0.3 | 1.0 | 0.7 | 1.9 | 3.7 |
| Gift | 3.2 | 1.3 | 9.2 | 6.4 | 3.9 | 1.7 | 3.1 |
| Other | 7.8 | 14.4 | 6.0 | 21.0 | 8.7 | 3.2 | 3.3 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Base | 98.2% | 99.5% | 99.0% | 98.7% | 98.5% | 97.0% | 96.5% |
| Average Dollars Spent: | $396 | $461 | $451 | $457 | $412 | $341 | $462 |

Source: Strategy Research Corporation

## C. VCR OWNERSHIP

### 1. Incidence of Ownership

Approximately 62% of all U.S. Hispanic households report ownership of a VCR slightly less than the 67% incidence level reported by non-Hispanics.

Hispanic households in the Northeast report the highest incidence of VCR ownership at 75%. Conversely only one-half of Hispanic households in the Southwest report VCR ownership. Hispanic households in the Central, West and Southeast Regions report similar incidences of VCR ownership (between 62.5% and 64.2%).

**HOUSEHOLD VCR OWNERSHIP AMONG HISPANICS AND NON-HISPANICS 1991**

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total | Northeast | Southeast | Central | Southwest | West | Non-Hispanics |
| Own a VCR | 61.6% | 75.4% | 64.2% | 62.5% | 50.8% | 62.7% | 67.3% |
| Don't Own a VCR | 38.4 | 24.6 | 35.8 | 37.5 | 49.2 | 37.3 | 32.7 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

### 2. Store/Price of Most Recent VCR Purchase

As shown on the next page, slightly over one-half of VCR's owned by Hispanic households in the Northeast and the Southwest were purchased in department stores. Nearly 43% of Southeast Hispanic households and nearly one-third of Hispanic households in the West also purchased VCRs in department stores. appliance and electronic stores comprised the purchase origin for over one-half of Hispanic household VCR purchases in the Central Region. However, another one-fourth of VCR sales to Hispanics in the Central Region originated from "other" types of outlets which include "a friend," "flea market," "bought on the street", etc.

As shown below, the average price paid for a VCR among Hispanics was $300, as compared with $314 by non-Hispanics. The highest price ($412) paid for a VCR is reported by Central Region Hispanics of the country, followed by the Southeast, at $334. The Southwest shows the lowest ownership of VCR's and the lowest average price paid.

A little more than three out of five Hispanic households (62%) own a VCR, while virtually all (98%) own a television. The incidence of VCR ownership among Hispanics is higher than among non-Hispanics (62% versus 67%). With the price of VCR's becoming more and more competitive and lower, the incidence of ownership among Hispanics is sure to increase, as it is likely to continue to increase among the general market.

### TYPE OF STORE OF VCR PURCHASE AND AVERAGE VCR COST HISPANICS AND NON-HISPANICS

### 1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| Place Of Purchase: | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Department Store | 40.2% | 50.4% | 42.7% | 17.6% | 52.2% | 31.4% | 30.5% |
| Appliance Store | 20.8 | 16.1 | 5.6 | 25.7 | 15.8 | 28.3 | 16.4 |
| Electronic Store | 15.2 | 12.2 | 36.0 | 27.3 | 5.6 | 15.7 | 21.1 |
| Discount Store/ Catalog Store | 12.4 | 2.2 | 6.6 | 2.7 | 16.4 | 17.6 | 12.9 |
| Catalog By Mail | 1.3 | 0.8 | 0.0 | 1.0 | 0.4 | 2.2 | 6.0 |
| Other | 10.1 | 18.3 | 9.1 | 25.7 | 9.6 | 4.8 | 13.1 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Base | 61.6% | 75.4% | 64.2% | 62.5% | 50.8% | 62.7% | 67.3% |
| Average Dollars Spent: | $300 | $291 | $334 | $412 | $287 | $291 | $314 |

Source: Strategy Research Corporation

## D. VIDEO CAMERA OWNERSHIP

### 1. Incidence of Ownership

Slightly over 7% of Hispanic households own a Video camera, as compared with almost 12% of non-Hispanic households who own a video camera. The incidence of ownership among Hispanic households is slightly higher in the Southeast (13%) and Central (10%) Regions, while lowest (4%) in the Southwest Region, as is the case with TV and VCR ownership.

**HOUSEHOLD OWNERSHIP**
**OF VIDEO CAMERAS**
**HISPANICS AND NON-HISPANICS**
**1991**

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total | Northeast | Southeast | Central | Southwest | West | Non-Hispanic |
| Own a Video Camera | 7.3% | 6.6% | 13.4% | 10.7% | 4.4% | 7.7% | 11.5% |
| Don't Own a Video Camera | 92.7 | 93.4 | 86.6 | 89.3 | 95.6 | 92.3 | 88.5 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

### 2. Store/Price of Most Recent Video Camera Purchase

Department stores dominate video camera purchases by Hispanics in the Southwest and Northeast Regions. Electronic stores appear to be strongest in video camera sales to Hispanics in the Southeast (46%), and the Central (31%) Regions. Appliance stores are patronized for video camera purchases most frequently in the Western (26%) and Central (22%) Regions of the country.

The average purchase price paid by Hispanics for a video camera was highest at $936 in the Southeast and $934 in the Southwest. The purchase price was below average in the Central and West Regions, at $753 and $780, respectively. Non-Hispanics paid an average of $843 for a video camera, slightly less than Hispanics paid.

## STORE OF VIDEO CAMERA PURCHASE AND AVERAGE DOLLAR AMOUNT OF PURCHASE HISPANICS AND NON-HISPANICS

## 1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| Place Of Purchase: | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Department Store | 41.7% | 65.0% | 31.8% | 31.2% | 71.3% | 28.2% | 39.2% |
| Electronic Store | 25.0 | 10.0 | 46.3 | 31.3 | 17.6 | 23.9 | 18.8 |
| Appliance Store | 16.3 | 15.0 | 4.9 | 21.9 | 0.0 | 26.1 | 14.5 |
| Discount Store | 8.3 | 0.0 | 2.4 | 3.1 | 11.1 | 13.0 | 16.0 |
| Catalog | 3.7 | 5.0 | 4.8 | 3.1 | 0.0 | 4.4 | 14.5 |
| Other | 5.0 | 5.0 | 9.8 | 9.4 | 0.0 | 4.4 | 10.1 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Base | 7.3% | 6.6% | 13.4% | 10.7% | 4.4% | 7.7% | 11.5% |
| Average Dollars Spent: | $852 | $925 | $936 | $753 | $934 | $780 | $843 |

Source: Strategy Research Corporation

The difference of ownership of Video cameras between Hispanics and non-Hispanics is 7% and 12%, respectively. This is quite significant in light of the cost of video cameras and their relatively recent entrance into the consumer marketplace. In time, competitive prices will increase ownership in both sectors.

## E. HOME STEREO OWNERSHIP

### 1. Incidence of Ownership

Nearly three out of five (58%) Hispanic households, compared with one out of five non-Hispanic households, own home stereo equipment. Regionally, ownership of home stereo equipment among Hispanic households is slightly higher in the Southeast and Southwest Regions (62%) and lowest in the Central Region (47%).

**HOUSEHOLD OWNERSHIP
OF HOME STEREO EQUIPMENT
HISPANICS AND NON-HISPANICS
1991**

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Own Stereo Equipment | 58.4% | 55.7% | 61.6% | 47.2% | 61.6% | 58.0% | 49.6% |
| Don't Own Stereo Equipment | 41.6 | 44.3 | 38.4 | 52.8 | 38.4 | 42.0 | 50.4 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

### 2. Store/Price of Most Recent Purchase

As shown on the next page, department stores (40%) dominate purchases of home stereo equipment by Hispanic households, while non-Hispanics split their patronage more equally among department stores (33%) and electronic stores (30%). Purchases of stereo equipment by Hispanics at department stores are dominant in the Southwest (53%) and Northeast (51%) Regions. Together, department and electronic stores account for 81% of home stereo equipment purchases by Hispanic households in the Southeast Region. In the West, department and appliance stores combined, comprise nearly 55% of home stereo equipment purchases by Hispanics.

Two-thirds of the home stereo equipment owned by Hispanic households in the Central Region was purchased nearly equally from electronic stores (25%), appliance stores (21%) and department stores (20%). However, another one-fourth of home stereo equipment sales to Hispanics in the Central Region originated from "Other" sources.

Department stores are most popular for home stereo equipment purchases by Hispanics in the Southwest (53%) and Northeast (51%) Regions. Electronic stores appear strongest in home stereo equipment sales to Hispanics in the Southeast. (40%). Appliance stores are patronized much more frequently for home stereo purchases by Hispanics in the West than in any other region.

The highest average prices paid by Hispanics for home stereo equipment range from $528 in the Southeast Region to $460 in the Central Region. The lowest average prices were in the West ($398) and the Southwest ($410). Non-Hispanics report an average of $583 for recent home stereo equipment purchases.

For marketers of home stereo equipment, the potential remains strong for sales to Hispanics across the country. However, price sensitivity appears to be especially a competitive issue in the West and Southwest Regions.

### STORE ORIGIN OF HOME STEREO EQUIPMENT
### AVERAGE DOLLAR AMOUNT OF PURCHASE
### HISPANICS AND NON-HISPANICS
### 1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| Place Of Purchase: | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Department Store | 39.7% | 50.6% | 41.3% | 19.9% | 52.8% | 28.0% | 32.6% |
| Appliance Store | 17.2 | 14.1 | 2.6 | 21.3 | 9.1 | 26.8 | 10.4 |
| Electronic Store | 16.2 | 17.6 | 39.7 | 24.8 | 3.4 | 18.4 | 30.0 |
| Discount Store | 15.4 | 1.8 | 4.2 | 6.4 | 20.2 | 20.7 | 8.1 |
| Catalog | 1.8 | 1.2 | 1.1 | 0.7 | 2.2 | 2.0 | 3.4 |
| Other | 9.7 | 14.7 | 11.1 | 26.9 | 12.3 | 4.1 | 15.5 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Base | 58.4% | 55.7% | 61.6% | 47.2% | 61.6% | 58.0% | 49.6% |
| Average Dollars Spent: | $429 | $480 | $528 | $460 | $410 | $398 | $583 |

Source: Strategy Research Corporation

## F. COMPACT DISC EQUIPMENT OWNERSHIP

### 1. Incidence of Ownership

Slightly more than 10% of all U.S. Hispanic households and 14% of non-Hispanic households own compact disc equipment. Hispanic household ownership of compact disc equipment is highest in the Southeast (15%) and West (14%), and lowest in the Northeast Region (4%).

**HISPANIC HOUSEHOLD OWNERSHIP
OF COMPACT DISC EQUIPMENT
HISPANICS AND NON-HISPANICS
1991**

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Own Compact Disc Equipment | 10.3% | 3.6% | 15.3% | 9.7% | 7.6% | 13.7% | 14.0% |
| Don't Own Compact Disc Equipment | 89.7 | 96.4 | 84.7 | 90.3 | 92.4 | 86.3 | 86.0 |
| TOTAL | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

### 2. Store/Price of Recent Purchase

Overall, the purchase of compact disc equipment by Hispanics is about evenly divided among department (30%), appliance (27%) and electronic stores (25%). Non-Hispanics divide the majority of their compact disc purchases with department (31%) and electronic (25%) stores, but only 8% report making compact disc purchases at appliance stores. The table on the next page shows these distributions.

Regionally, the majority of Hispanics in the Southwest (59%) and Northeast (55%) report compact disc equipment purchases at department stores. In the Southeast, electronic stores (68%) dominate sales of compact disc equipment to Hispanics. In the West Region, appliance stores lead other types of retailers in compact disc equipment purchased by Hispanics. Over one-third (35%) of compact disc equipment sales to Hispanics in the Central Region originate from "Other" sources.

The highest average price paid by Hispanics for compact disc equipment is in the Central Region ($564), 57% above average, while the lowest average price paid was in the Southeast Region ($288). Non-Hispanics report paying an average of $387 for compact disc equipment.

The implications for compact disc equipment marketers is that compact disc equipment, as a relatively new sound technology, appears to be just beginning to grow in popularity. Hispanics love music as well as any other ethnic group, particularly that of their country of origin. Among Hispanics, ownership of compact disc equipment will likely grow in direct proportion to the availability of a broader range of ethnic music on compact disc. Price sensitivity and competition will likely be as important as the availability of compact discs.

## STORE ORIGIN OF COMPACT DISC EQUIPMENT AVERAGE DOLLAR AMOUNT OF PURCHASE HISPANICS AND NON-HISPANICS

## 1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| Place Of Purchase: | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Department Store | 29.6% | 54.5% | 25.5% | 17.3% | 58.8% | 18.3% | 31.0% |
| Appliance Store | 26.6 | 9.1 | 0.0 | 10.3 | 9.0 | 42.7 | 8.3 |
| Electronic Store | 24.9 | 27.3 | 68.1 | 27.6 | 6.8 | 20.7 | 29.8 |
| Discount Store | 11.9 | 9.1 | 2.1 | 10.3 | 18.9 | 12.2 | 13.1 |
| Other | 7.0 | 0.0 | 4.3 | 34.5 | 6.5 | 6.1 | 17.8 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Base | 10.3% | 3.6% | 15.3% | 9.7% | 7.6% | 13.7% | 14.0% |
| Average Dollars Spent: | $359 | $382 | $288 | $564 | $332 | $364 | $387 |

Source: Strategy Research Corporation

## G. PORTABLE CASSETTE OWNERSHIP

### 1. Incidence of Ownership

Nearly two-thirds of Hispanic households and slightly over one-half of non-Hispanic households report ownership of a portable radio/cassette player. The incidence of ownership among Hispanics is highest (80%) in the Northeast and lowest in the Southeast (57%) and West (59%) Regions.

HOUSEHOLD OWNERSHIP OF PORTABLE STEREO,
RADIO/TAPE CASSETTE PLAYERS
HISPANICS AND NON-HISPANIC
1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Own a Portable Stereo Radio/Tape Cassette Player | 64.3% | 80.0% | 57.3% | 75.3% | 63.1% | 58.9% | 53.1% |
| Don't Own a Portable Stereo Radio/Tape Cassette Player | 35.7 | 20.0 | 42.7 | 24.7 | 36.9 | 41.1 | 46.9 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

### 2. Store/Price of Recent Purchase

The table on the next page shows the type of stores of purchase and price paid for portable stereo and radio/tape cassette players among Hispanics and non-Hispanics. As indicated, Hispanics use of department stores to purchase these items was highest in the Southwest (49%), the Northeast (41%) and the Southeast (40%). Electronic stores were most popular in the West (33%), and discount stores, most popular in the Southwest (20%).

The highest average price paid by Hispanics for portable cassette players is $157 in the Central Region, while the lowest average price ($66) was in the Southwest Region. Between these two extremes are average prices which range from $84 in the Northeast to $108 in the Southeast. The overall average price paid by Hispanics is $90 as compared with the $117 paid by non-Hispanics.

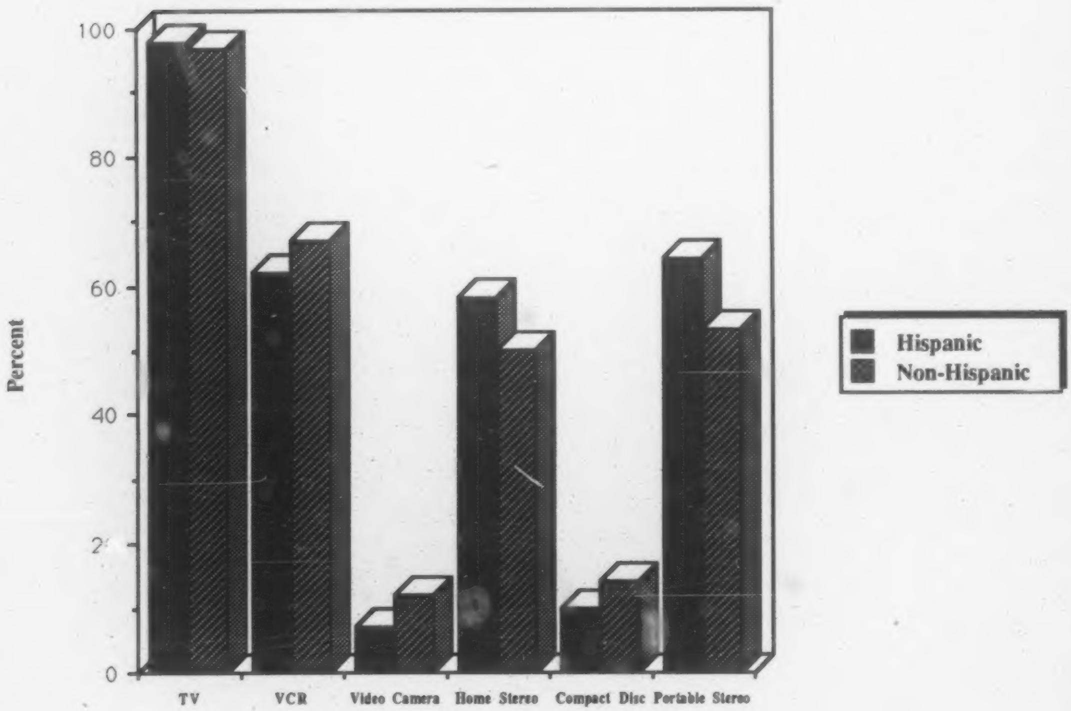
The potential for portable radio/cassette player sales to Hispanics exists in all regions with particular emphasis in the Southeast and the West. In these two Regions the incidence of ownership leaves room for expansion, and the average price, though competitive, is not at the price sensitivity level.

## STORE ORIGIN OF PORTABLE STEREO AND RADIO/TAPE CASSETTE PLAYER AVERAGE DOLLAR AMOUNT OF PURCHASE HISPANICS AND NON-HISPANICS 1991

| | | Hispanics | | | | | |
|---|---|---|---|---|---|---|---|
| Place Of Purchase: | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Department Store | 33.8% | 40.6% | 39.7% | 13.4% | 49.0% | 21.3% | 31.7% |
| Electronic Store | 20.7 | 10.7 | 29.5 | 31.1 | 6.3 | 32.7 | 18.2 |
| Discount Store | 16.8 | 13.5 | 11.4 | 7.6 | 20.3 | 18.8 | 16.7 |
| Appliance Store | 13.6 | 10.7 | 3.4 | 16.0 | 7.9 | 21.0 | 10.1 |
| Catalog | 1.4 | 0.0 | 0.6 | 0.0 | 2.4 | 0.0 | 2.5 |
| Other | 13.7 | 24.5 | 15.4 | 31.9 | 14.1 | 4.2 | 20.8 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Base | 64.3% | 80.0% | 57.3% | 75.3% | 63.1% | 58.9% | 53.1% |
| Average Dollars Spent: | $90 | $84 | $108 | $157 | $66 | $96 | $117 |

Source: Strategy Research Corporation

## Incidence of Electronic Equipment Ownership



## H. HISPANIC GROCERY SHOPPING PATTERNS

### 1. Types of Stores Patronized

American chain supermarkets dominate grocery shopping among most U.S. Hispanics. This dominance is strongest in the Northeast and Southwest Regions of the country. In the Southeast, Latin Supermarkets are most often included as a grocery shopping destination by Hispanic households, but are a second choice after small Latin bodegas in the Central Region and a third choice after American chain supermarkets and Latin Bodegas in the Northeast.

Small Latin bodegas are the most frequent grocery shopping destination for Hispanic households in the Central Region, while second to American chain supermarkets in the Northeast. When compared with other Regions, American convenience stores are strongest in the Central Region, while very weak in the Southeast.

**TYPES OF GROCERY STORES PATRONIZED**
**DURING THE LAST MONTH**
**AMONG HISPANICS**
**1991**

| | Total | Northeast | Southeast | Central | Southwest | West |
|---|---|---|---|---|---|---|
| American Chain Supermarket | 78.5% | 76.4% | 57.7% | 75.6% | 91.3% | 75.8% |
| Latin Supermarket | 55.9 | 47.9 | 65.5 | 79.9 | 38.4 | 65.4 |
| Small Latin Bodega | 56.9 | 72.8 | 40.1 | 93.0 | 34.9 | 64.0 |
| American Convenience Store | 24.7 | 13.4 | 7.2 | 43.1 | 26.5 | 29.3 |
| Total | * | * | * | * | * | * |

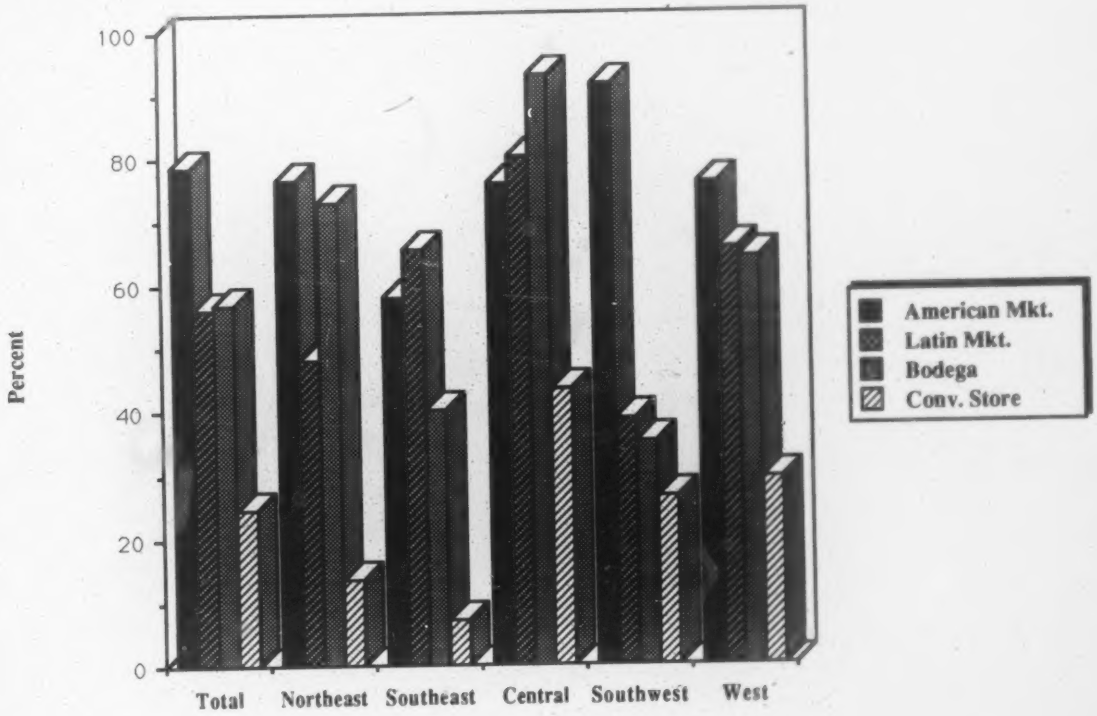
*Does not add to 100% due to multiple response.

Source: Strategy Research Corporation

For American Chain Supermarkets that want to target and capture the Hispanic household grocery shopper, a challenge exists in the Southeast. The grocery shopping gap unfulfilled by the American Chain Supermarkets in the Southeast has permitted the Latin Supermarket to gain in dominance. Without merchandising, product, and location changes, the American Chain Supermarkets may continue to lose dominance to the Latin Supermarkets.

For Latin supermarkets, competitive opportunities exist in the Northeast and Central Regions. Similar competitive opportunities exist for small Latin bodegas in the Southeast. However, it should be noted that the small Latin bodega has already eroded the dominance of American convenience stores in the Southeast. American convenience stores must make dramatic changes in product and merchandising in highly Hispanic areas and neighborhoods, otherwise they may be forced to continue losing market share.

## Grocery Shopping Destination During The Last Month Among Hispanics



## 2. Average Weekly Grocery Expenditures

Hispanic household average weekly grocery shopping expenditures are highest in the West ($125) and Central ($114) Regions. Overall, **U.S. Hispanics spend more than $50 billion a year on groceries.**

### AVERAGE WEEKLY GROCERY EXPENDITURES AMONG HISPANIC HOUSEHOLDS
### 1991

| | |
|---|---|
| Total U.S. | $106.95 |
| Regions | |
| Northeast | $ 93.15 |
| Southeast | $101.17 |
| Central | $113.84 |
| Southwest | $90.80 |
| West | $125.34 |

Source: Strategy Research Corporation

Average weekly grocery shopping expenditures by Hispanic households in Hispanic bodegas is highest in the Central ($52) Region and lowest in the Southeast ($14) and Southwest ($11) Regions.

### AVERAGE WEEKLY GROCERY EXPENDITURES AMONG HISPANIC HOUSEHOLDS AT HISPANIC BODEGAS
### 1991

| | |
|---|---|
| Total U.S. | $24.15 |
| Regions | |
| Northeast | $21.85 |
| Southeast | $13.79 |
| Central | $51.75 |
| Southwest | $11.49 |
| West | $31.05 |

Source: Strategy Research Corporation

## I. WOMEN'S CLOTHING SHOPPING

Hispanic respondents report shopping for women's clothing an average of more than once a month in the Southwest, West and Southeast, with annual frequencies ranging from 13 and 14 times per year, respectively. Interestingly, in the colder regions, the Central and Northeast, the average shopping trips are less per year.

### FREQUENCY OF HISPANIC HOUSEHOLD SHOPPING FOR WOMEN'S CLOTHING HISPANIC HEADS OF HOUSEHOLD 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Average Number Of Times Per Year | 12.3 | 8.6 | 12.6 | 9.9 | 13.8 | 13.0 |

Source: Strategy Research Corporation

For Retailers in the Southeast, Southwest and West this data implies that retail merchandising targeted toward Hispanic women's clothing shoppers should run more on a monthly basis rather than on a seasonal basis. The purchasing and delivery of women's clothing to the shelves or racks should be broadened to several months of a season in order that the Hispanic women's clothing shoppers (who in most areas of the country shop once a month or more) will be exposed to a steady stream of fresh new merchandise.

This fresh new look of the women's clothing selection will enhance spontaneous purchases while providing a steady flow of Hispanic women's clothing shoppers, retail sales and cash flow. In addition, this merchandising and purchasing strategy would increase the turnover of merchandise, lower payable exposure, reduce the risk of an unpopular item (or bad buy) and would likely increase sales.

Hispanic shoppers for women's clothing prefer to shop in the company of family members on shopping trips. As shown on the table below, more than 71% of Hispanic women were accompanied by either a family member or friend during the last clothing shopping trip. Nearly 83% of Central Region Hispanic women reported shopping with family or friends, while only some 55% of Northeast Hispanic women reported shopping with friends or relatives.

The average number of persons included on the most recent shopping trip for women's clothing among Hispanic women was 2.3. The number ranged from 2.6 persons in the Central and Southwest Regions to 1.7 persons in the Northeast.

### CLOTHING SHOPPING PATTERNS AMONG HISPANIC HEADS OF HOUSEHOLD 1991

| People Accompanying Last Shopping Trip | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Shopped Alone | 28.7% | 45.2% | 21.2% | 17.3% | 21.5% | 30.1% |
| Shopped With Family Member | 54.4 | 28.9 | 63.2 | 66.6 | 68.4 | 51.7 |
| Shopped With Non-Family Member | 16.9 | 25.9 | 15.6 | 16.1 | 10.1 | 18.2 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Average Number of Persons on Last Shopping Trip | 2.3 | 1.7 | 2.4 | 2.6 | 2.6 | 2.4 |

Source: Strategy Research Corporation

## J. SHOPPING WITH CHILDREN AMONG HISPANICS

Overall, more than two out of five adult Hispanic shoppers shop with children. About one-half of Hispanic adults shop with children in the Central and Southwest Regions, while nearly one-third of Northwest Region Hispanic adults shop with children.

### INCIDENCE OF HISPANICS ADULTS SHOPPING WITH CHILDREN 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Shop With Children | 43.1% | 31.5% | 42.7% | 53.5% | 48.6% | 42.8% |
| Don't Shop Shop With Children | 56.9 | 68.5 | 57.3 | 46.5 | 51.4 | 57.2 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

Approximately two out of five adult Hispanics who shop with children are influenced by them. This ratio varies in the different areas of the country and ranges from one-half in the West to about a one-third in the Northeast. Children appear to have the greatest influence on Hispanic shoppers in the Central and West Regions of the country, as shown on the following table.

### INFLUENCE OF CHILDREN WHEN SHOPPING 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Influenced by Children | 43.8% | 31.8% | 38.4% | 47.5% | 41.8% | 50.5% |
| Not Influenced by Children | 56.2 | 68.2 | 61.6 | 52.5 | 58.2 | 49.5 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## K. DISCOUNT COUPON USAGE

### 1. Incidence of Coupon Usage

Slightly less than one-half (46%) of U.S. Hispanics use discount (price-off) coupons. While this is substantially below the incidence of usage among non-Hispanics (65%) as shown below, it is nevertheless an increase in usage among Hispanics since 1987, when 38% reported using coupons.

The major distinction for the country's five Regions was among Southwest Hispanics, where 70% of Hispanics report using discount coupons. Just over one-third of Northeast and West Hispanic households use discount coupons, while close to one-third of all Hispanic households in the Southeast and Central Regions use discount coupons.

DISCOUNT COUPON USE
HISPANICS AND NON-HISPANICS
1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| Use Discount Discount Coupons | 45.8% | 36.4% | 31.9% | 32.8% | 70.3% | 38.1% | 64.9% |
| Don't Use Discount Coupons | 54.2 | 63.6 | 68.1 | 67.2 | 29.7 | 61.9 | 35.1 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Strategy Research Corporation

## 2. Regional Frequency of Coupon Usage

In the Southwest, where the incidence of coupon usage among Hispanic is greatest, frequency of usage is also significantly higher than for any other Region, and higher than among Non-Hispanics. Nearly 41% of Southwest Hispanics use coupons four or more times per month, or approximately one or more times per week. The average usage among Southwest Hispanics is just over three times a month, the highest average among the five Regions.

Southeast Hispanic households use discount coupons an average of slightly under twice per month, compared to Southwest Hispanics who have a higher coupon usage incidence at almost three times per month. Northeast Hispanics, meanwhile, use coupons the least frequently among the five Regions, at only slightly more than once every three weeks.

### FREQUENCY OF COUPON USAGE AMONG HISPANICS AND NON-HISPANICS IN THE PAST THREE MONTHS
### 1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| Coupon Usage Past 3 Months | Total | North-east | South-east | Central | South-west | West | Non-Hispanic |
| 1-4 Times | 39.6% | 60.3% | 43.9% | 62.2% | 24.8% | 46.5% | 36.2% |
| 5-10 Times | 32.5 | 36.0 | 49.0 | 21.5 | 34.5 | 27.2 | 24.9 |
| 11 Or More Times | 26.1 | 2.7 | 7.1 | 13.3 | 40.7 | 22.0 | 36.6 |
| None | 1.8 | 1.0 | 0.0 | 1.0 | 0.0 | 4.3 | 2.3 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Base | 45.8% | 36.4% | 31.9% | 32.8% | 70.3% | 38.1% | 64.9% |
| Weighted Avg. | 7.3 | 4.6 | 5.7 | 5.2 | 9.5 | 6.2 | 8.7 |

Source: Strategy Research Corporation

## 3. Coupon Sources

Throughout the country, discount coupons are most often obtained by Hispanic households from either newspapers (41%), or received in the mail (36%). Southeast and West Region Hispanics differ from this, as coupons received in the mail represent the most important source in these two areas among Hispanics. Newspapers are the largest source of discount coupons for Hispanic households in the Southwest, the best Hispanic market for coupons.

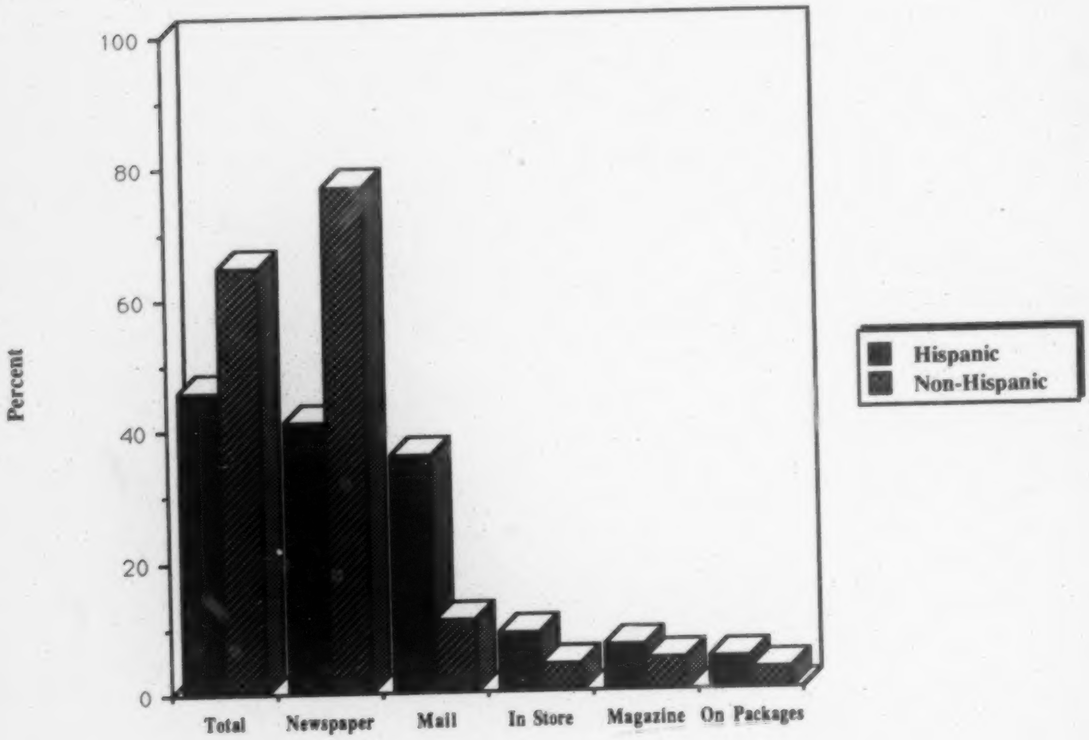
For Hispanic households, newspapers and the mail constitute 90% of the sources for discount coupons in the Southeast, 89% of the discount coupon source in the Southwest and about two-thirds in the West. Conversely, only six out of ten Hispanic households in the Northeast and Central Regions receive discount coupons from these two sources. Among non-Hispanics, newspapers are source to 77% of coupon usage, compared to 41% among non-Hispanics. Coupons from product packages constitute a low percentage of the sources of discount coupons for Hispanics as well as non-Hispanics, except among West Region Hispanics where product packaging as a source of coupons is relatively high at 11%.

### MOST FREQUENT SOURCES OF COUPONS AMONG HISPANICS AND NON-HISPANICS 1991

| | Hispanics | | | | | | |
|---|---|---|---|---|---|---|---|
| | Total | Northeast | Southeast | Central | Southwest | West | Non-Hispanic |
| Newspapers | 41.0% | 39.7% | 30.6% | 30.7% | 56.6% | 25.5% | 76.6% |
| Received by Mail | 35.5 | 19.8 | 60.2 | 27.6 | 33.1 | 40.8 | 10.5 |
| Distributed In The Stores | 8.7 | 13.5 | 5.1 | 6.1 | 7.1 | 9.6 | 4.1 |
| Magazines | 7.0 | 14.4 | 1.0 | 7.2 | 1.3 | 12.3 | 5.4 |
| In Or On Packages | 4.7 | 0.9 | 2.6 | 3.6 | 1.5 | 10.5 | 3.1 |
| Magazine/Mail/ Product Package | 0.1 | 0.9 | 0.5 | 0.5 | 0.0 | 0.0 | 0.0 |
| Other | 3.0 | 10.8 | 0.0 | 24.3 | 0.4 | 1.3 | 0.3 |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Base | 45.8% | 36.4% | 31.9% | 32.8% | 70.3% | 38.1% | 64.9% |

Source: Strategy Research Corporation

## Source of Discount Coupon Usage



## L. LUXURY/EXPENSIVE ITEMS OWNERSHIP

The incidence of ownership of such luxury items as men's and women's jewelry, expensive perfumes, handbags and luggage are highest among Hispanics in the Southeast. Luxury wrist watch ownership is highest in the Northeast. Cellular telephone and home computer ownership is relatively low among Hispanics, only 2.6% and 3.8% of all Hispanic households, respectively, own these luxury items.

### OWNERSHIP OF LUXURY/EXPENSIVE ITEMS* AMONG U.S. HISPANICS 1991

| | Total | North-east | South-east | Central | South-west | West |
|---|---|---|---|---|---|---|
| Cellular Telephone | 2.6% | 1.3% | 2.3% | 4.7% | 2.1% | 2.8% |
| Home Computer | 3.8 | 3.6 | 4.6 | 3.3 | 2.3 | 4.8 |
| Jewelry For: | | | | | | |
| Men | 21.9 | 22.6 | 38.1 | 20.7 | 26.0 | 15.7 |
| Women | 28.3 | 28.5 | 43.6 | 27.4 | 33.1 | 21.9 |
| Leather Coats | 13.2 | 22.0 | 17.9 | 13.7 | 9.6 | 11.0 |
| Fur Coats | 4.7 | 6.2 | 7.5 | 4.7 | 3.9 | 4.0 |
| Perfumes | 13.0 | 22.0 | 46.9 | 4.3 | 14.4 | 6.7 |
| Hand Bags | 10.4 | 15.1 | 37.1 | 2.3 | 12.0 | 2.8 |
| Luggage | 14.7 | 22.0 | 46.9 | 4.3 | 14.4 | 6.7 |
| Wrist Watch | 26.2 | 43.6 | 28.6 | 9.4 | 20.6 | 18.2 |

*Items valued at $150 or more.
Source: Strategy Research Corporation

# XI

# MARKET EVALUATIONS

# XI. MARKET EVALUATIONS

| INDEX OF MARKETS | | PAGE NUMBER |
|---|---|---|
| 1 | Los Angeles | 172 |
| 2 | New York | 176 |
| 3 | Miami | 182 |
| 4. | San Antonio | 186 |
| 5. | San Francisco | 192 |
| 6. | Chicago | 196 |
| 7. | Houston | 201 |
| 8 | McAllen-Brownsville | 206 |
| 9 | Albuquerque | 210 |
| 10 | El Paso | 216 |
| 11 | San Diego | 222 |
| 12 | Fresno | 226 |
| 13 | Dallas-Ft. Worth | 230 |
| 14 | Phoenix | 236 |
| 15 | Sacramento-Stockton | 241 |
| 16 | Corpus Christi | 245 |
| 17 | Denver | 249 |
| 18 | Tucson | 256 |
| 19 | Philadelphia | 259 |
| 20 | Salinas-Monterey | 263 |
| 21 | Austin | 266 |
| 22 | Tampa-St. Petersburg | 270 |
| 23 | Laredo | 273 |
| 24 | Boston | 276 |
| 25 | Odessa-Midland | 280 |
| 26 | Bakersfield | 283 |
| 27 | Lubbock | 286 |
| 28 | El Centro-Yuma | 291 |
| 29 | Washington, D.C. | 294 |
| 30 | Santa Barbara-Santa Maria-San Luis Obispo | 300 |
| 31 | Colorado Springs | 303 |
| 32 | Hartford-New Haven | 307 |
| 33 | Salt Lake City | 310 |
| 34 | Detroit | 316 |
| 35 | Seattle-Tacoma | 319 |
| 36 | Waco-Temple | 323 |
| 37 | Amarillo | 326 |
| 38 | Portland, OR | 331 |
| 39 | Orlando-Daytona Beach-Melbourne | 336 |
| 40 | Yakima | 339 |
| 41 | Milwaukee | 342 |
| 42 | West Palm Beach-Ft. Pierce-Vero Beach | 345 |
| 43 | Las Vegas | 348 |
| 44 | New Orleans | 351 |
| 45 | Palm Springs | 354 |
| 46 | Atlanta | 357 |
| 47 | Cleveland | 364 |
| 48 | Kansas City | 368 |
| 49 | Abilene-Sweetwater | 373 |
| 50 | Providence-New Bedford | 376 |

## MARKET 1

# LOS ANGELES

*MARKET SIZE: 5,194,700 HISPANIC POPULATION*

## 1. Hispanic Population

The Los Angeles market is the top-ranked Hispanic market in the United States. One-fifth of all Hispanics in the United States reside in the Los Angeles ADI. Its estimated Hispanic population for 1991 is 5.2 million. Three-fourths of these Hispanics claim residence in Los Angeles County. Los Angeles County has a population of nearly 3.8 million, making it the largest Hispanic-populated county in the United States. Orange County is the second most Hispanic populated county within the market with 587,000 Hispanics, or 11% of the total Hispanic population in the Los Angeles ADI. San Bernardino County is the third most populated, accounting for 7% of the ADI's Hispanics.

The overall Los Angles ADI experienced a growth in Hispanic population of 90% between 1980 and 1991, with each individual county growing substantially over the eleven year period.

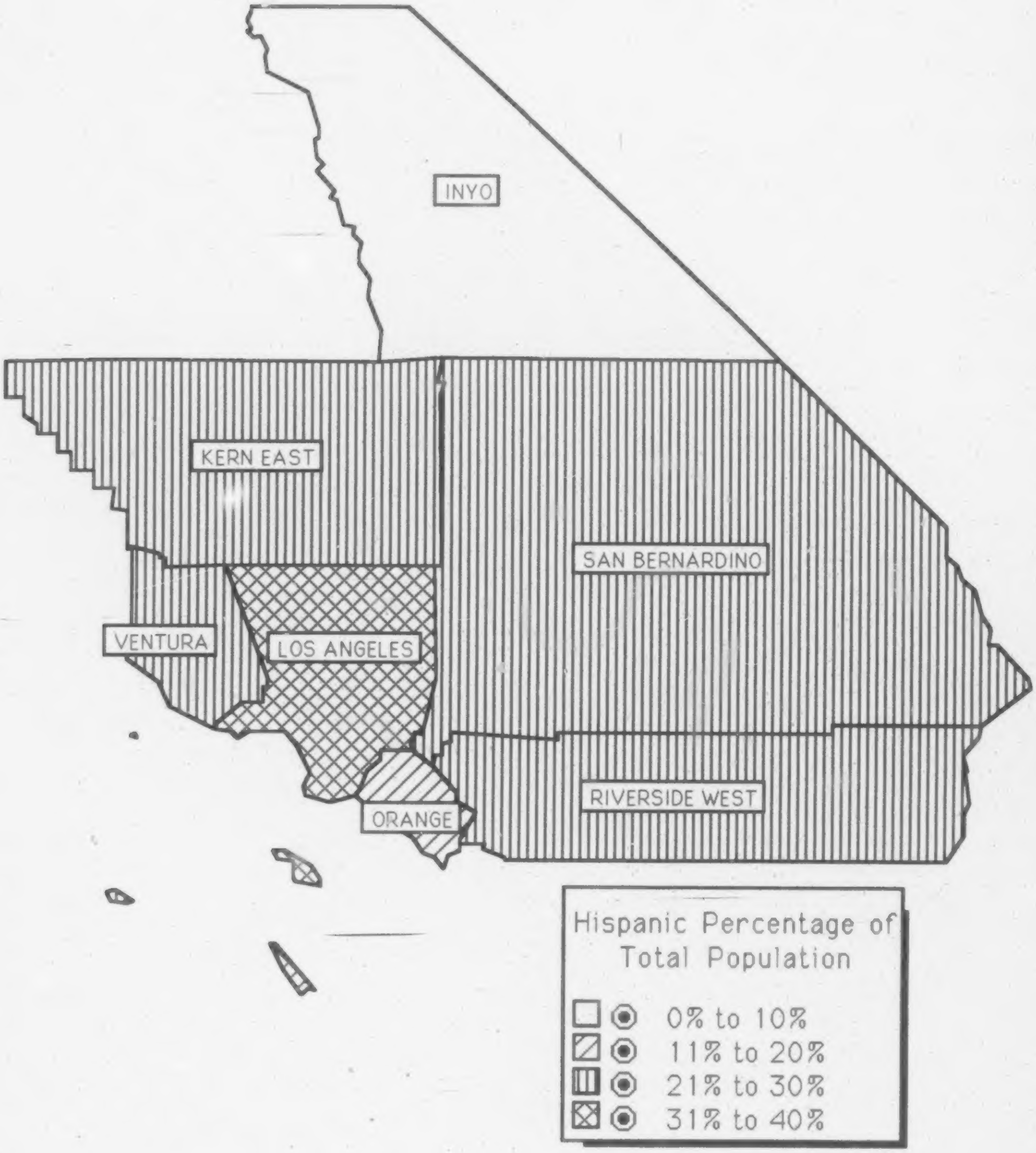
Between 1989 and 1991, the area experienced a Hispanic growth rate of 16% (734,800 persons).

### LOS ANGELES HISPANIC POPULATION 1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Inyo | CA | 1.1 | 1.4 | 1.7 | 1.9 |
| Kern East | CA | 3.4 | 17.0 | 23.8 | 26.3 |
| Los Angeles | CA | 2,065.7 | 2,506.2 | 3,252.4 | 3,799.0 |
| Orange | CA | 286.3 | 366.9 | 473.4 | 587.0 |
| Riverside West | CA | 102.6 | 111.3 | 190.4 | 199.3 |
| San Bernardino | CA | 165.3 | 208.1 | 324.4 | 372.5 |
| Ventura | CA | 113.2 | 142.8 | 193.8 | 208.7 |
| TOTAL | | 2,737.6 | 3,353.7 | 4,459.9 | 5,194.7 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Los Angeles ADI


INYO
KERN EAST
SAN BERNARDINO
VENTURA
LOS ANGELES
ORANGE
RIVERSIDE WEST
Hispanic Percentage of Total Population
□ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%
⊠ ◉ 31% to 40%

## 2. Hispanic Population/Households - Total Population

The Los Angeles ADI consists of a total population of 16.9 million. Hispanics comprise 31% of its total population.

Of the ADI's seven counties, Los Angeles, Orange and San Bernadino are the three most populated overall. Roughly over one-third (36%) of Los Angeles County's estimated total population of 10.6 million persons is Hispanic. Hispanics compose 20% of Orange County's population and 23% of San Bernadino's.

Overall, there are an estimated 3.8 persons per Hispanic household in the Los Angeles ADI; thus, 1.4 million households are headed by persons of Hispanic origin or descent.

### LOS ANGELES
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Inyo | CA | 1.9 | 0.6 | 7.8% | 24.4 |
| Kern East | CA | 26.3 | 6.8 | 26.3 | 99.8 |
| Los Angeles | CA | 3,799.0 | 1,015.7 | 35.7 | 10,641.5 |
| Orange | CA | 587.0 | 146.4 | 20.3 | 2,891.9 |
| Riverside West | CA | 199.3 | 50.8 | 23.5 | 847.9 |
| San Bernardino | CA | 372.5 | 101.0 | 23.3 | 1,598.8 |
| Ventura | CA | 208.7 | 50.7 | 26.9 | 775.8 |
| TOTAL | | 5,194.7 | 1,372.0 | 30.8% | 16,880.1 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The Los Angeles ADI is a young market with slightly more 18+ males than females.

The Hispanic adult population (18 years or more) represents 64% of the total Hispanic population of the Los Angeles ADI. The 18-34 year-old category represents 35% of the total Hispanic population, and more than half of the adult Hispanic population in the ADI. The older age group of 50 years or more represents 12% of the total Hispanic population in the area.

### LOS ANGELES
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 391.1 | | 7.5% | |
| Males 25-34 | 571.6 | | 11.0 | |
| Males 35-49 | 437.6 | | 8.4 | |
| Males 50-54 | 71.9 | | 1.4 | |
| Males 55-64 | 143.8 | | 2.8 | |
| Males 65+ | 70.5 | | 1.4 | |
| **Males 18+** | | **1,686.5** | | **32.5%** |
| Females 18-24 | 339.9 | | 6.6 | |
| Females 25-34 | 507.6 | | 9.8 | |
| Females 35-49 | 428.3 | | 8.2 | |
| Females 50-54 | 78.9 | | 1.5 | |
| Females 55-64 | 158.3 | | 3.0 | |
| Females 65+ | 118.1 | | 2.3 | |
| **Females 18+** | | **1,631.1** | | **31.4** |
| **Teens (12-17)** | 592.2 | **592.2** | 11.4 | **11.4** |
| **Children (0-11)** | | **1,284.9** | | **24.7** |
| Children (2-11) | 1,072.3 | | 20.6 | |
| TOTAL 2+ | 4,982.1 | | 95.9% | |
| **TOTAL** | | **5,194.7** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

Close to three-fourths of Los Angeles Hispanics are of Mexican origin. Immigrants from El Salvador, Guatemala and Nicaragua have been entering the market in recent years; Central Americans currently make up about 22% of the ADI's Hispanic Population.

## 5. Length Of Residency

The average length of residency among Hispanics in the Los Angeles ADI is 11 years and 5 months. The fact that the Los Angeles ADI has one of the shortest length of residency in the United States makes it a viable market for advertisers in the United States, and for those who are interested in exporting from Mexico. These Hispanics will have new products exposed to them, as well as familiarity of products used in their homeland.

## 6. Language Spoken At Home

Approximately 72% of Los Angeles Hispanics report that they speak Spanish most frequently at home.

This high incidence of Spanish language usage in the home is a good indicator that it is the language they most identify with, and the language they most prefer to be addressed with by advertisers.

## 7. Other Ownership Characteristics

The following are additional Hispanic household information for the Los Angeles market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status**, and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS
### HISPANIC HOUSEHOLDS
### 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 18% | 246,960 |
| VCRs | 77% | 1,056,440 |
| Without Telephone | 19% | 260,680 |
| With Unlisted Telephone | 47% | 644,840 |
| Average Number of TV Sets Per Household | 2.2 | -- |

Source:Strategy Research Corporation

Among the other ADI's for which similar ownership status was obtained, Los Angeles is the leader in percentage of Hispanic households owning VCR's at 77%.

## MARKET 2

# NEW YORK

*MARKET SIZE: 2,998,700 HISPANIC POPULATION*

### 1. Hispanic Population

The New York market is the second largest Hispanic market in the United States. Its nearly 3 million Hispanic residents account for 12% of the country's total 1991 Hispanic population.

The New York ADI's Hispanic population is heavily concentrated within New York City's boroughs. The four largest counties, Bronx, Kings, Queens, and New York, account for 67% of all Hispanics in the ADI, with some 2 million persons.

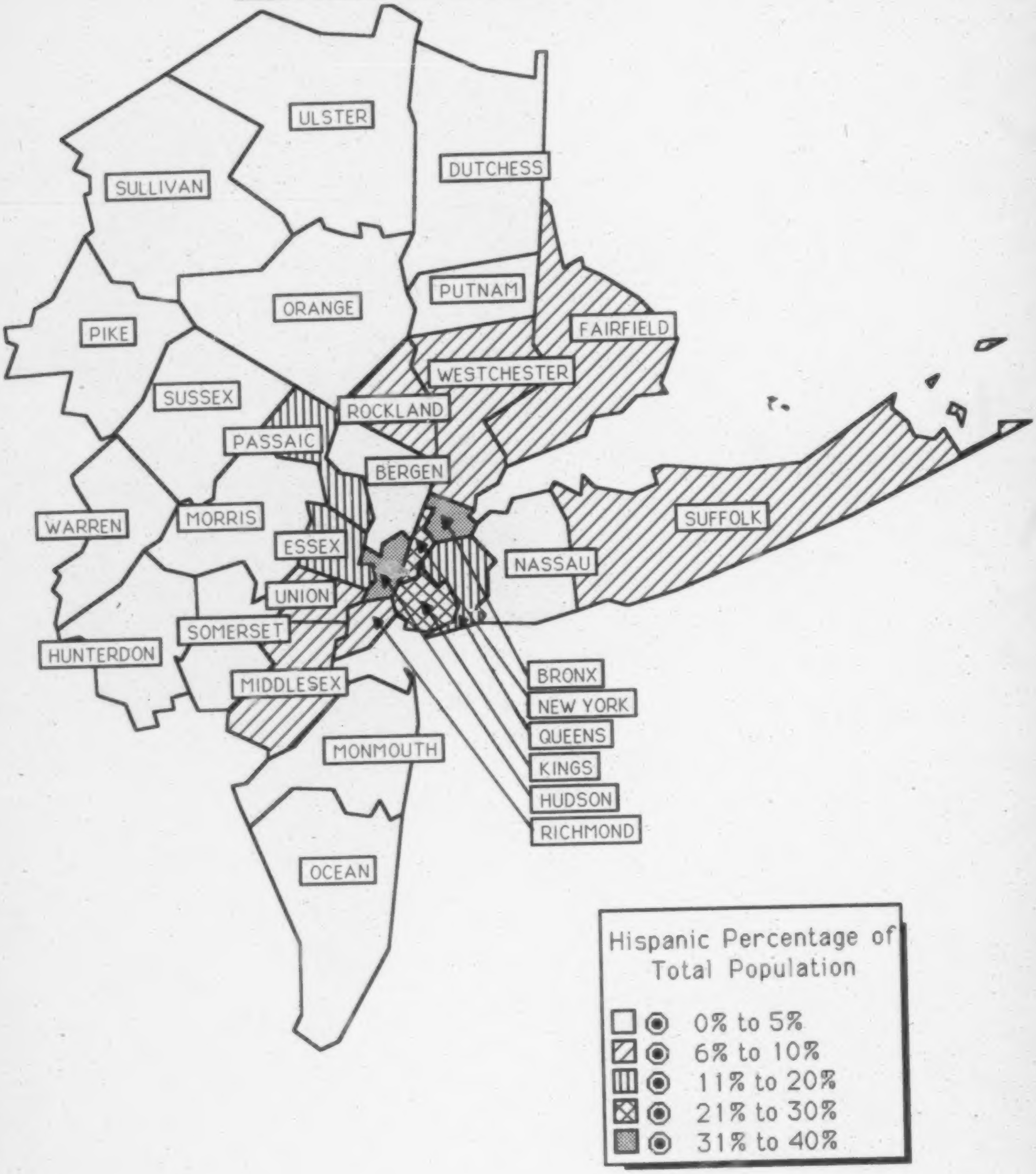
The following table reflects the Hispanic population of the 29 counties that comprise the New York ADI. The counties include those in the neighboring states of Connecticut, New Jersey and Pennsylvania.

NEW YORK
HISPANIC POPULATION
1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Fairfield | CT | 45.1 | 52.1 | 56.6 | 60.5 |
| Bergen | NJ | 28.5 | 36.6 | 39.2 | 41.2 |
| Essex | NJ | 76.6 | 92.6 | 98.4 | 102.6 |
| Hudson | NJ | 145.2 | 182.4 | 195.0 | 201.6 |
| Hunterdon | NJ | 1.0 | 1.0 | 1.4 | 1.4 |
| Middlesex | NJ | 34.1 | 41.8 | 45.4 | 51.2 |
| Monmouth | NJ | 12.9 | 16.4 | 18.2 | 20.4 |
| Morris | NJ | 11.0 | 13.6 | 14.8 | 16.2 |
| Ocean | NJ | 8.4 | 10.7 | 11.9 | 13.4 |
| Passaic | NJ | 62.1 | 77.1 | 81.9 | 94.6 |
| Somerset | NJ | 4.1 | 5.0 | 5.5 | 6.1 |
| Sussex | NJ | 1.8 | 1.9 | 2.5 | 2.8 |
| Union | NJ | 40.8 | 52.8 | 56.2 | 59.8 |
| Warren | NJ | 1.0 | NA | 1.3 | 1.5 |
| Bronx | NY | 396.7 | 423.8 | 497.8 | 533.6 |
| Dutchess | NY | 5.9 | 7.3 | 7.8 | 8.6 |

Continued...

# New York ADI


ULSTER
SULLIVAN
DUTCHESS
PUTNAM
ORANGE
PIKE
FAIRFIELD
WESTCHESTER
SUSSEX
ROCKLAND
PASSAIC
BERGEN
WARREN
MORRIS
SUFFOLK
ESSEX
NASSAU
UNION
SOMERSET
HUNTERDON
MIDDLESEX
BRONX
NEW YORK
QUEENS
KINGS
HUDSON
RICHMOND
MONMOUTH
OCEAN
Hispanic Percentage of Total Population
☐ ◉ 0% to 5%
▨ ◉ 6% to 10%
▥ ◉ 11% to 20%
☒ ◉ 21% to 30%
▩ ◉ 31% to 40%

## NEW YORK
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Kings | NY | 392.1 | 435.1 | 492.6 | 531.0 |
| Nassau | NY | 43.3 | 55.4 | 59.2 | 62.8 |
| New York | NY | 335.8 | 391.3 | 428.6 | 470.1 |
| Orange | NY | 11.3 | 13.8 | 14.8 | 17.0 |
| Putnam | NY | 1.3 | 1.5 | 1.7 | 1.8 |
| Queens | NY | 262.4 | 348.8 | 380.7 | 480.2 |
| Richmond | NY | 18.9 | 23.4 | 25.2 | 28.4 |
| Rockland | NY | 11.8 | 14.5 | 15.3 | 16.7 |
| Suffolk | NY | 58.7 | 72.8 | 76.7 | 84.1 |
| Sullivan | NY | 2.7 | 3.3 | 3.4 | 3.6 |
| Ulster | NY | 4.9 | 5.7 | 6.4 | 7.2 |
| Westchester | NY | 45.6 | 61.2 | 67.1 | 80.0 |
| Pike | PA | 0.2 | 0.4 | 0.4 | 0.3 |
| TOTAL | | 2,064.2 | 2,442.3 | 2,706.0 | 2,998.7 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

The total population of the New York ADI is estimated at 21.3 million. Its 3 million Hispanics represent 14% of the New York ADI's total population, as shown below. The ADI's 3 million Hispanic persons are housed in approximately 1.0 million households, producing an average of three persons per household.

### NEW YORK
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Fairfield | CT | 60.5 | 18.0 | 6.4% | 945.3 |
| Bergen | NJ | 41.2 | 13.5 | 4.3 | 950.4 |
| Essex | NJ | 102.6 | 32.4 | 10.9 | 941.4 |
| Hudson | NJ | 201.6 | 70.9 | 31.6 | 637.9 |
| Hunterdon | NJ | 1.4 | 0.4 | 1.3 | 107.7 |
| Middlesex | NJ | 51.2 | 15.3 | 7.5 | 682.1 |
| Monmouth | NJ | 20.4 | 6.2 | 3.3 | 616.7 |
| Morris | NJ | 16.2 | 4.6 | 3.5 | 462.7 |
| Ocean | NJ | 13.4 | 4.1 | 3.2 | 420.3 |
| Passaic | NJ | 94.6 | 29.1 | 17.8 | 531.5 |
| Somerset | NJ | 6.1 | 1.9 | 2.6 | 236.2 |
| Sussex | NJ | 2.8 | 0.8 | 2.0 | 137.5 |
| Union | NJ | 59.8 | 19.7 | 10.1 | 592.4 |
| Warren | NJ | 1.5 | 0.5 | 1.4 | 100.9 |

Continued...

## NEW YORK
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Bronx | NY | 533.6 | 183.4 | 40.4 | 1,320.7 |
| Dutchess | NY | 8.6 | 2.1 | 2.9 | 303.3 |
| Kings | NY | 531.0 | 178.8 | 21.3 | 2,492.8 |
| Nassau | NY | 62.8 | 17.8 | 4.3 | 1,460.7 |
| New York | NY | 470.1 | 180.9 | 28.0 | 1,679.1 |
| Orange | NY | 17.0 | 4.9 | 5.3 | 320.6 |
| Putnam | NY | 1.8 | 0.5 | 1.9 | 93.0 |
| Queens | NY | 480.2 | 162.3 | 18.6 | 2,582.0 |
| Richmond | NY | 28.4 | 8.7 | 6.5 | 436.6 |
| Rockland | NY | 16.7 | 4.6 | 5.5 | 303.0 |
| Suffolk | NY | 84.1 | 22.1 | 5.7 | 1,474.9 |
| Sullivan | NY | 3.6 | 0.9 | 4.9 | 73.4 |
| Ulster | NY | 7.2 | 2.1 | 3.8 | 188.5 |
| Westchester | NY | 80.0 | 25.4 | 7.0 | 1,142.1 |
| Pike | PA | 0.3 | 0.1 | 1.7 | 18.2 |
| TOTAL | | 2,998.7 | 1,012.0 | 14.1% | 21,251.9 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Approximately 70% of the Hispanics in the New York ADI are under 35 years of age. This percentage is equally distributed by those that are under 18 years of age and those that are between 18 and 34.

There are 12% more Hispanic females 18+ than there are Hispanic males 18+ in the New York ADI.

**NEW YORK**
**HISPANIC AGE/SEX DISTRIBUTION**
**1991**

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 209.1 | | 7.0% | |
| Males 25-34 | 300.7 | | 10.0 | |
| Males 35-49 | 236.5 | | 7.9 | |
| Males 50-54 | 43.1 | | 1.4 | |
| Males 55-64 | 86.2 | | 2.9 | |
| Males 65+ | 38.1 | | 1.3 | |
| **Males 18+** | | **913.7** | | **30.5%** |
| Females 18-24 | 215.3 | | 7.2 | |
| Females 25-34 | 311.0 | | 10.4 | |
| Females 35-49 | 274.2 | | 9.1 | |
| Females 50-54 | 51.4 | | 1.7 | |
| Females 55-64 | 102.7 | | 3.4 | |
| Females 65+ | 70.0 | | 2.3 | |
| **Females 18+** | | **1,024.6** | | **34.1** |
| **Teens (12-17)** | 331.6 | **331.6** | 11.1 | **11.1** |
| **Children (0-11)** | | **728.8** | | **24.3** |
| Children (2-11) | 606.8 | | 20.2 | |
| TOTAL 2+ | 2,876.7 | | 95.9% | |
| **TOTAL** | | **2,998.7** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

Puerto Ricans continue to be the major Hispanic group in the New York market, representing 40% of the Hispanic population. Dominicans account for 22%, while Colombians have increased to 10%. Central and South Americans as a whole represent 25% of the area's Hispanic population base.

## 5. Length Of Residency

The average length of residency among New York ADI Hispanics is 15 years and 8 months.

## 6. Language Spoken At Home

Four out of five New York ADI Hispanics speak Spanish at home most frequently. An additional 14% speak both Spanish and English most often in the home.

Use of the Spanish language in this market in terms of media and advertising would be the most instrumental approach in marketing to these Hispanics.

## 7. Other Ownership Characteristics

The following are additional Hispanic household information for the New York market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

OTHER OWNERSHIP CHARACTERISTICS
HISPANIC HOUSEHOLDS
1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 30% | 303,600 |
| VCRs | 69% | 698,280 |
| Without Telephone | 35% | 354,200 |
| With Unlisted Telephone | 30% | 303,600 |
| Average Number of TV Sets Per Household | 2.1 | -- |

Source:Strategy Research Corporation

## MARKET 3

# MIAMI

*MARKET SIZE: 1,102,700 HISPANIC POPULATION*

## 1. Hispanic Population

The Miami ADI is ranked as the third largest Hispanic market in the United States, with 1.1 million Hispanics residing in the tri-county ADI, and representing 4.4% of all U.S. Hispanics. The vast majority of the Hispanics (89%) in the Miami ADI reside in Dade County. Dade County 's 1991 population is estimated at 985,800. Broward County holds the second highest Hispanic concentration within this ADI. It is home to 104,000 Hispanics.

In terms of growth rate, Broward County experienced a percentage increase of 158% since 1980. Whereas, Dade County enjoyed a percentage increase of 48% during the same time period. Between 1989 and 1991, Monroe County grew at a rate of 13%, similar to Broward's rate of 14%. The greatest influx of Hispanics for Monroe County occurred during the last six years of the measured 11 year period. This county, which includes the Florida Keys, grew at a rate of 74%, an increase of 5,500 Hispanics.

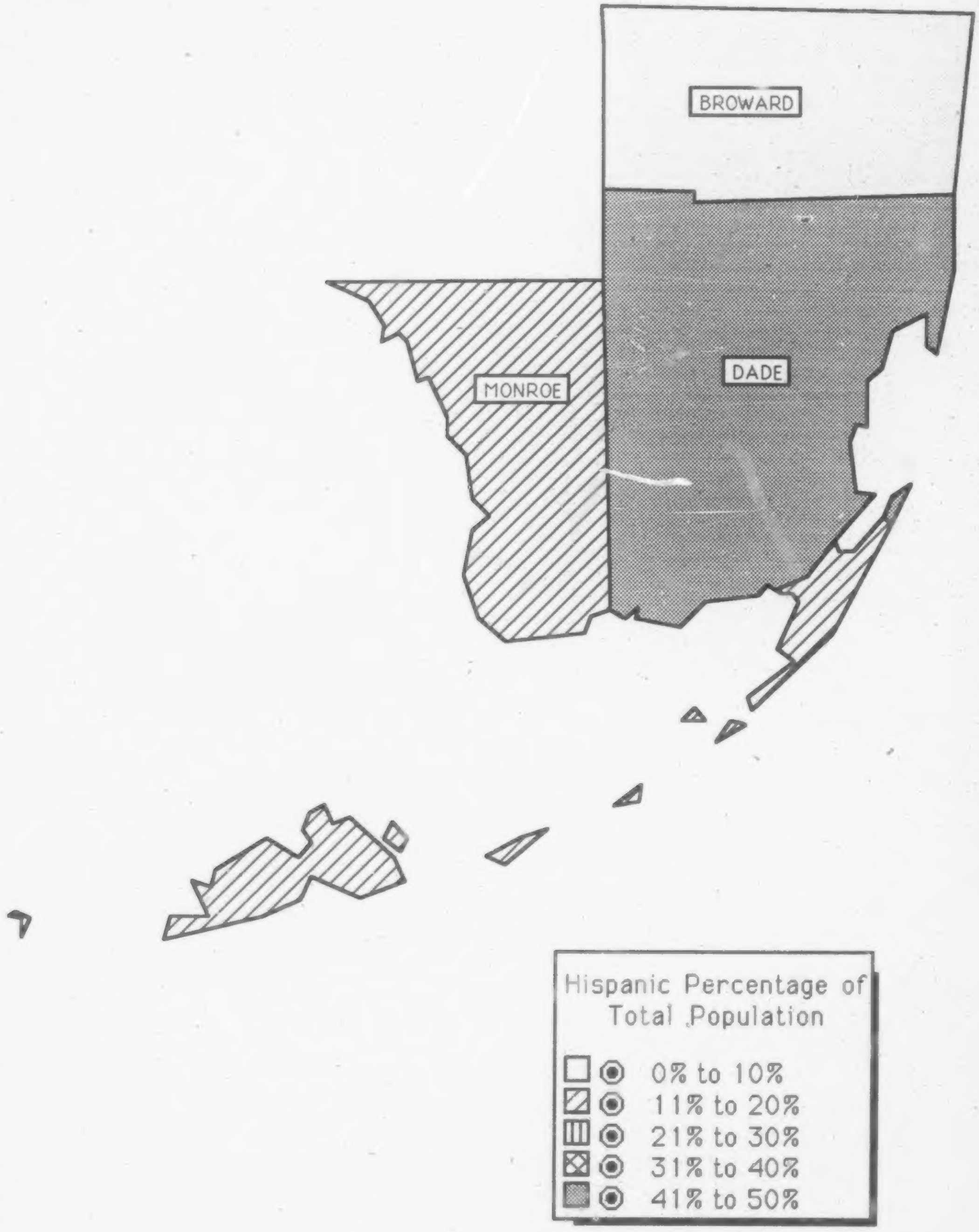
### MIAMI HISPANIC POPULATION

### 1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Broward | FL | 40.3 | 50.3 | 91.1 | 104.0 |
| Dade | FL | 664.5 | 805.8 | 910.8 | 985.8 |
| Monroe | FL | 7.2 | 7.4 | 11.4 | 12.9 |
| TOTAL | | 712.0 | 863.5 | 1,013.3 | 1,102.7 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Miami ADI


BROWARD
DADE
MONROE
Hispanic Percentage of Total Population
□ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%
⊠ ◉ 31% to 40%
▩ ◉ 41% to 50%

## 2. Hispanic Population/Households - Total Population

The Tri-County area consists of a population of 3,779,700 persons. Hispanics represent 29.2% of this total.

Dade County has the highest Hispanic concentration of the three counties; 44% of the County's population are of Hispanic origin or descent. The Florida Keys -- Monroe County, has the second largest concentration, at 15.3%.

The Miami market currently holds 391,600 Hispanic households, with an average of 2.9 persons per household.

### MIAMI
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Broward | FL | 104.0 | 35.6 | 7.1% | 1,464.8 |
| Dade | FL | 985.8 | 350.8 | 44.2 | 2,230.4 |
| Monroe | FL | 12.9 | 5.2 | 15.3 | 84.5 |
| TOTAL | | 1,102.7 | 391.6 | 29.2% | 3,779.7 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The Miami market is the oldest of the top 50 ADI markets, with 73% of the market consisting of adults aged 18 years or more. The balance of 27% are under 18 years of age, of which two-thirds are between the ages of 0-11.

Females represent 39% of the 18+ market population, which is 17% more than the 18+ males within the ADI.

### MIAMI
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 59.3 | | 5.4% | |
| Males 25-34 | 85.7 | | 7.8 | |
| Males 35-49 | 109.1 | | 9.9 | |
| Males 50-54 | 25.0 | | 2.3 | |
| Males 55-64 | 50.0 | | 4.5 | |
| Males 65+ | 38.9 | | 3.5 | |
| **Males 18+** | | **368.0** | | **33.4%** |
| Females 18-24 | 63.8 | | 5.8 | |
| Females 25-34 | 93.2 | | 8.5 | |
| Females 35-49 | 122.7 | | 11.1 | |
| Females 50-54 | 33.3 | | 3.0 | |
| Females 55-64 | 66.7 | | 6.0 | |
| Females 65+ | 52.8 | | 4.8 | |
| **Females 18+** | | **432.5** | | **39.2** |
| **Teens (12-17)** | 102.1 | **102.1** | 9.3 | **9.3** |
| **Children (0-11)** | | **200.1** | | **18.1** |
| Children (2-11) | 165.2 | | 15.0 | |
| TOTAL 2+ | 1,0678 | | 96.9% | |
| **TOTAL** | | **1,102.7** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

Cubans are currently the dominant Hispanic nationality in the Miami market, with 65% of the Hispanic heads of household presently being of Cuban origin or descent. Households headed by persons from Central America account for the second largest percentage of the market's Hispanic population base (15%), which is chiefly comprised of persons from Nicaragua.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the Miami market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household**.

### OTHER OWNERSHIP CHARACTERISTICS
### HISPANIC HOUSEHOLDS
### 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 44% | 172,304 |
| VCRs | 62% | 242,792 |
| Without Telephone | 9% | 35,244 |
| With Unlisted Telephone | 30% | 117,480 |
| Average Number of TV Sets Per Household | 2.2 | -- |

Source: Strategy Research Corporation

## MARKET 4

# SAN ANTONIO

*MARKET SIZE: 998,900 HISPANIC POPULATION*

### 1. Hispanic Population

The San Antonio market is comprised of 28 counties and ranks in fourth position nationwide with a Hispanic population of 998,900 persons.

Overall, the ADI grew by 360,400 Hispanics between 1980 and 1991, a percentage growth rate of 56%. Within the last two years, the San Antonio market increased by 3%.

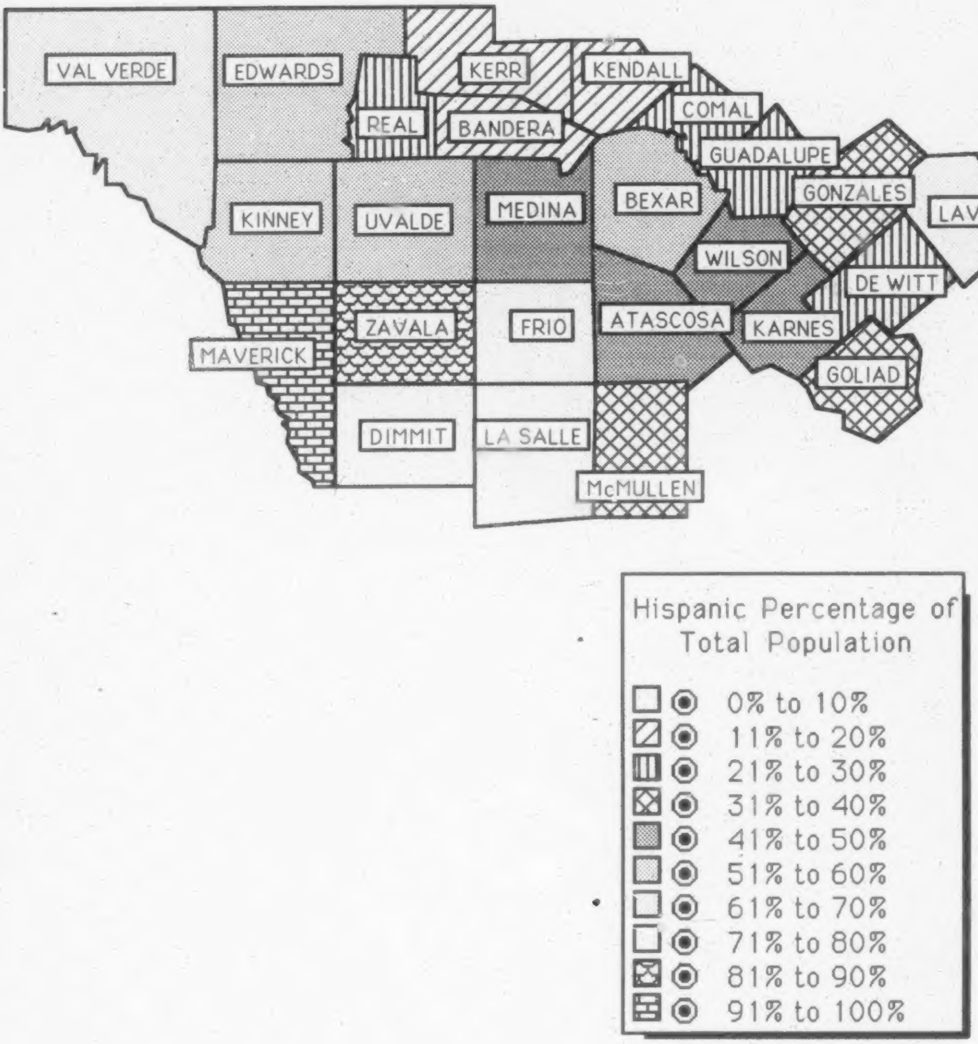
The counties within this ADI had various growth rates. Since 1980, Bexar County, the major Hispanic county of the ADI accounting for 74% of all Hispanics in the San Antonio market, grew 60%. With a current population of 737,000 Hispanics, this equates to an increased Hispanic population of 276,100 persons. Maverick County, the second largest county with a population of 43,900, had a growth rate of 65% since 1980. The third largest Hispanic populated county of the ADI is Val Verde, with 33,500 Hispanics and a growth of 57%. Interestingly, these counties are situated on the far west side of the ADI. The three Counties north of Bexar -- Kendall, Comal and Guadalupe, enjoyed a growth of over 70% since 1980. Recent population pressure within Bexar County is spilling over into Comal, which in the past 2 years has grown by 11%.

SAN ANTONIO
HISPANIC POPULATION
1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Atascosa | TX | 12.0 | 15.0 | 17.7 | 18.5 |
| Bandera | TX | 0.9 | 1.2 | 1.6 | 1.8 |
| Bexar | TX | 460.9 | 565.4 | 716.8 | 737.0 |
| Comal | TX | 8.7 | 11.0 | 13.8 | 15.3 |
| De Witt | TX | 4.4 | 4.9 | 5.7 | 5.9 |
| Dimmit | TX | 8.8 | 9.9 | 11.3 | 11.1 |
| Edwards | TX | 1.0 | 1.1 | 1.2 | 1.2 |
| Frio | TX | 9.4 | 11.2 | 12.9 | 13.0 |

Continued...

# San Antonio ADI


VAL VERDE
EDWARDS
KERR
KENDALL
REAL
BANDERA
COMAL
GUADALUPE
GONZALES
LAVACA
KINNEY
UVALDE
MEDINA
BEXAR
WILSON
DE WITT
ZAVALA
FRIO
ATASCOSA
KARNES
GOLIAD
MAVERICK
DIMMIT
LA SALLE
McMULLEN
Hispanic Percentage of Total Population
0% to 10%
11% to 20%
21% to 30%
31% to 40%
41% to 50%
51% to 60%
61% to 70%
71% to 80%
81% to 90%
91% to 100%

## SAN ANTONIO
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Gillespie | TX | 1.4 | 1.7 | NA | NA |
| Goliad | TX | 1.8 | 2.2 | 2.3 | 2.3 |
| Gonzales | TX | 4.9 | 5.6 | 6.6 | 6.8 |
| Guadalupe | TX | 11.9 | 14.7 | 19.0 | 20.7 |
| Karnes | TX | 5.8 | 6.5 | 7.4 | 7.6 |
| Kendall | TX | 1.4 | 1.7 | 2.7 | 2.9 |
| Kerr | TX | 3.9 | 5.0 | 6.5 | 6.6 |
| Kimble | TX | 0.7 | NA | NA | NA |
| Kinney | TX | 1.3 | 1.5 | 1.9 | 2.0 |
| La Salle | TX | 4.1 | 4.7 | 5.3 | 5.3 |
| La Vaca | TX | 1.3 | 1.5 | 1.6 | 1.6 |
| Live Oak | TX | 3.1 | 3.7 | NA | NA |
| McMullen | TX | 0.3 | 0.3 | 0.3 | 0.3 |
| Maverick | TX | 28.4 | 37.8 | 43.9 | 46.9 |
| Medina | TX | 10.0 | 11.8 | 13.9 | 14.9 |
| Real | TX | 0.6 | 0.7 | 0.7 | 0.7 |
| Uvalde | TX | 12.4 | 15.3 | 17.3 | 18.3 |
| Val Verde | TX | 22.6 | 28.7 | 33.5 | 35.5 |
| Wilson | TX | 6.1 | 7.4 | 9.4 | 10.3 |
| Zavala | TX | 10.4 | 11.3 | 12.2 | 12.4 |
| TOTAL | | 638.5 | 781.8 | 965.5 | 998.9 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

The San Antonio ADI has a total population of 2.0 million, of which 998,900 are Hispanics, accounting for 49% of the total population.

Bexar County is the ADI's most heavily populated county overall (1.4 million people). Approximately one-half (52%) of Bexar County is comprised of people of Hispanic origin/descent.

Overall, there are an estimated 3.5 persons per Hispanic household in the San Antonio ADI.

### SAN ANTONIO
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Atascosa | TX | 18.5 | 5.2 | 50.4% | 36.7 |
| Bandera | TX | 1.8 | 0.5 | 16.7 | 10.8 |
| Bexar | TX | 737.0 | 212.4 | 51.6 | 1,428.2 |
| Comal | TX | 15.3 | 4.2 | 25.2 | 60.7 |
| De Witt | TX | 5.9 | 1.6 | 25.0 | 23.6 |
| Dimmit | TX | 11.1 | 2.8 | 78.7 | 14.1 |
| Edwards | TX | 1.2 | 0.3 | 52.2 | 2.3 |
| Frio | TX | 13.0 | 3.5 | 71.4 | 18.2 |
| Goliad | TX | 2.3 | 0.6 | 38.3 | 6.0 |
| Gonzales | TX | 6.8 | 1.8 | 31.6 | 21.5 |
| Guadalupe | TX | 20.7 | 5.8 | 27.0 | 76.7 |

Continued...

## SAN ANTONIO
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Karnes | TX | 7.6 | 2.1 | 45.2 | 16.8 |
| Kendall | TX | 2.9 | 0.8 | 13.7 | 21.2 |
| Kerr | TX | 6.6 | 1.8 | 15.1 | 43.7 |
| Kinney | TX | 2.0 | 0.5 | 55.6 | 3.6 |
| La Salle | TX | 5.3 | 1.5 | 74.6 | 7.1 |
| La Vaca | TX | 1.6 | 0.4 | 7.2 | 22.2 |
| McMullen | TX | 0.3 | 0.1 | 37.5 | 0.8 |
| Maverick | TX | 46.9 | 11.5 | 92.7 | 50.6 |
| Medina | TX | 14.9 | 4.1 | 45.6 | 32.7 |
| Real | TX | 0.7 | 0.2 | 22.6 | 3.1 |
| Uvalde | TX | 18.3 | 4.7 | 59.2 | 30.9 |
| Val Verde | TX | 35.5 | 9.1 | 66.7 | 53.2 |
| Wilson | TX | 10.3 | 2.9 | 42.2 | 24.4 |
| Zavala | TX | 12.4 | 3.1 | 89.9 | 13.8 |
| TOTAL | | 998.9 | 281.5 | 49.4% | 2,022.9 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The San Antonio market is a young market, with 41% of the Hispanic population under 18 years of age. An additional 28% are between the ages of 18-34. Female is the dominant gender with a 32% distribution.

### SAN ANTONIO
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 56.0 | | 5.6% | |
| Males 25-34 | 80.3 | | 8.0 | |
| Males 35-49 | 64.9 | | 6.5 | |
| Males 50-54 | 16.1 | | 1.6 | |
| Males 55-64 | 32.4 | | 3.3 | |
| Males 65+ | 25.0 | | 2.5 | |
| **Males 18+** | | **274.7** | | **27.5%** |
| Females 18-24 | 59.0 | | 5.9 | |
| Females 25-34 | 84.5 | | 8.5 | |
| Females 35-49 | 78.1 | | 7.8 | |
| Females 50-54 | 19.4 | | 1.9 | |
| Females 55-64 | 38.7 | | 3.9 | |
| Females 65+ | 34.7 | | 3.5 | |
| **Females 18+** | | **314.4** | | **31.5** |
| **Teens (12-17)** | 133.7 | **133.7** | 13.4 | **13.4** |
| **Children (0-11)** | | **276.1** | | **27.6** |
| Children (2-11) | 230.6 | | 23.0 | |
| TOTAL 2+ | 953.4 | | 95.4% | |
| **TOTAL** | | **998.9** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country of Origin

San Antonio's Hispanic residents are predominantly of Mexican origin; 99% of the Hispanic heads of household are of Mexican origin or descent.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the San Antonio market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household**.

### OTHER OWNERSHIP CHARACTERISTICS
### HISPANIC HOUSEHOLDS
### 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 47% | 132,305 |
| VCRs | 58% | 163,270 |
| Without Telephone | 26% | 73,190 |
| With Unlisted Telephone | 40% | 112,600 |
| Average Number of TV Sets Per Household | 2.0 | -- |

Source: Strategy Research Corporation

## MARKET 5

# SAN FRANCISCO

*MARKET SIZE: 986,500 HISPANIC POPULATION*

### 1. Hispanic Population

Containing an estimated 4% of U.S. Hispanics, the San Francisco ADI is the fifth largest Hispanic market in the United States.

The San Francisco ADI is home to approximately 986,500 Hispanics. This constitutes an increase of 269,300 in the past six years and 358,400 Hispanics since the year 1980.

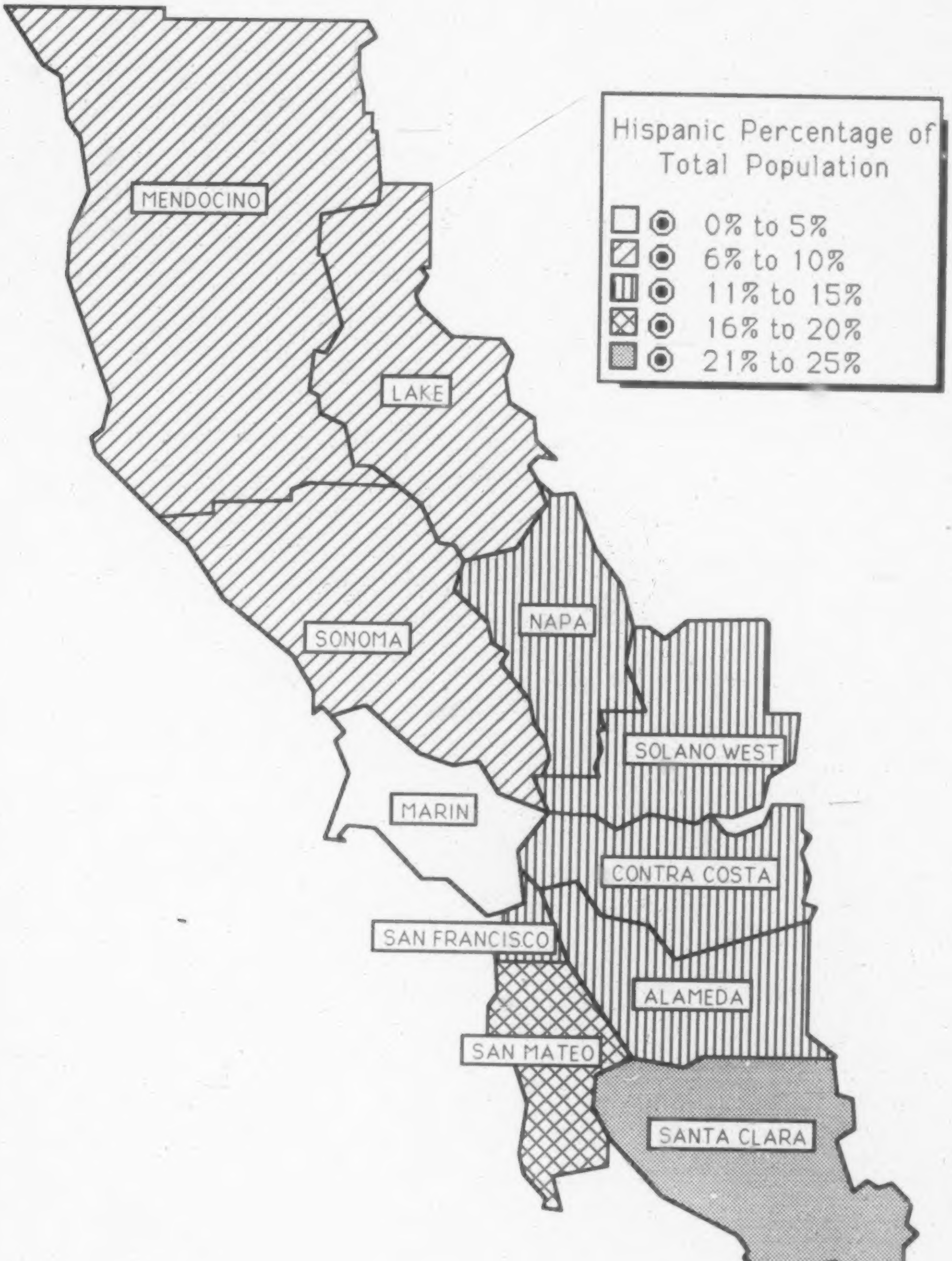
This ADI is comprised of eleven counties of which five counties contain 91% of the ADI's Hispanic population. Of these five counties, Santa Clara, Alameda, San Francisco, San Mateo and Contra Costa West, Santa Clara is the largest, with 348,800 Hispanic residents which correlates to 35% of the ADI's Hispanic population. The second largest populated county is Alameda with a Hispanic population of 207,100 containing 21% of the ADI's Hispanic residents. San Francisco County is third with 121,400 Hispanics, or 12% of the total Hispanics in the ADI.

### SAN FRANCISCO HISPANIC POPULATION 1980,1985,1989,1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Alameda | CA | 130.0 | 149.9 | 188.5 | 207.1 |
| Contra Costa West | CA | 56.0 | 60.7 | 97.3 | 106.3 |
| Lake | CA | 1.9 | 2.3 | 3.7 | 3.9 |
| Marin | CA | 9.2 | 10.6 | 11.8 | 13.0 |
| Mendocino | CA | 3.7 | 4.3 | 5.5 | 5.8 |
| Napa | CA | 8.6 | 10.5 | 12.0 | 12.7 |
| San Francisco | CA | 83.4 | 93.8 | 119.3 | 121.4 |
| San Mateo | CA | 73.4 | 87.2 | 101.0 | 112.3 |
| Santa Clara | CA | 226.6 | 260.3 | 318.7 | 348.8 |
| Solano West | CA | 14.4 | 12.5 | 17.5 | 18.9 |
| Sonoma | CA | 20.9 | 25.1 | 32.2 | 36.3 |
| TOTAL | | 628.1 | 717.2 | 907.5 | 986.5 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# San Francisco ADI


Hispanic Percentage of Total Population
□ 0% to 5%
▨ 6% to 10%
▥ 11% to 15%
⊠ 16% to 20%
▩ 21% to 25%
MENDOCINO
LAKE
SONOMA
NAPA
SOLANO WEST
MARIN
CONTRA COSTA
SAN FRANCISCO
ALAMEDA
SAN MATEO
SANTA CLARA

## 2. Hispanic Population/Households - Total Population

The estimated 1991 population of the San Francisco ADI is approximately 6.6 million. Hispanics constitute [illegible]5% of the total population.

Better than one third of these Hispanics reside in Santa Clara County. The residents of Hispanic origin or descent represent an estimated 22% of the county's total population. San Mateo County with a concentration of 16%, has the second heaviest density of Hispanics, while Alameda County contains the second largest number of Hispanics, 207,100, or 21% of the ADI's total.

The San Francisco ADI contains 294,900 Hispanic households, which translates to approximately 3.3 persons per household.

### SAN FRANCISCO
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Alameda | CA | 207.1 | 63.5 | 14.8% | 1,399.1 |
| Contra Costa | CA | 106.3 | 31.7 | 11.2 | 949.1 |
| Lake | CA | 3.9 | 1.1 | 6.5 | [illegible].5 |
| Marin | CA | 13.0 | 4.1 | 5.2 | 249.9 |
| Mendocino | CA | 5.8 | 1.5 | 7.0 | 82.4 |
| Napa | CA | 12.7 | 3.6 | 10.8 | 117.3 |
| San Francisco | CA | 121.4 | 41.7 | 14.4 | 842.9 |
| San Mateo | CA | 112.3 | 33.3 | 16.0 | 701.6 |
| Santa Clara | CA | 348.8 | 98.8 | 21.5 | 1,622.1 |
| Solano West | CA | 18.9 | 5.3 | 12.6 | 150.4 |
| Sonoma | CA | 36.3 | 10.3 | 8.7 | 417.5 |
| TOTAL | | 986.5 | 294.9 | 15.0% | 6,592.8 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Males and females of the San Francisco ADI are fairly evenly distributed in terms of the adult population. There are an estimated 321,600 female adults as compared with 317,700 male adults. The group under 18 years of age represents 35% of the ADI's Hispanic population of which two-thirds are under 12 years of age.

### SAN FRANCISCO
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 70.5 | | 7.2% | |
| Males 25-34 | 101.8 | | 10.3 | |
| Males 35-49 | 82.1 | | 8.3 | |
| Males 50-54 | 15.8 | | 1.6 | |
| Males 55-64 | 31.6 | | 3.2 | |
| Males 65+ | 15.9 | | 1.6 | |
| **Males 18+** | | **317.7** | | **32.2%** |
| Females 18-24 | 64.2 | | 6.5 | |
| Females 25-34 | 94.1 | | 9.5 | |
| Females 35-49 | 84.1 | | 8.5 | |
| Females 50-54 | 17.1 | | 1.7 | |
| Females 55-64 | 34.1 | | 3.5 | |
| Females 65+ | 28.0 | | 2.9 | |
| **Females 18+** | | **321.6** | | **32.6** |
| **Teens (12-17)** | 115.4 | **115.4** | 11.7 | **11.7** |
| **Children (0-11)** | | **231.8** | | **23.5** |
| Children (2-11) | 193.0 | | 19.6 | |
| TOTAL 2+ | 947.7 | | 96.1% | |
| **TOTAL** | | **986.5** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

The San Francisco Hispanic population, including the San Jose area, is mostly (77%) of Mexican descent.

## 5. Ownership Characteristics

The following represents additional Hispanic household information for the San Francisco market concerning **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS HISPANIC HOUSEHOLDS 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 51% | 150,399 |
| VCRs | 71% | 209,379 |
| Without Telephone | 16% | 47,184 |
| With Unlisted Telephone | 35% | 103,215 |
| Average Number of TV Sets Per Household | 2.3 | -- |

Source: Strategy Research Corporation

## MARKET 6

# CHICAGO

*MARKET SIZE: 985,300 HISPANIC POPULATION*

### 1. Hispanic Population

The Chicago market is the sixth largest Hispanic market in the United States. Its growth of 33% in the past six years represents one of the largest population increases among major Hispanic markets.

The Chicago ADI is currently made up of 18 counties (five of which are in neighboring Indiana), with an estimated Hispanic population totaling 985,300 in 1991. Cook County represents the vast majority of the Hispanics in the Chicago ADI, with a population of 778,400, which equates to 79% of the ADI. Cook County is also the third largest Hispanic county within the United States, preceded by Los Angeles County (3.8 million) and Dade County (985,800).

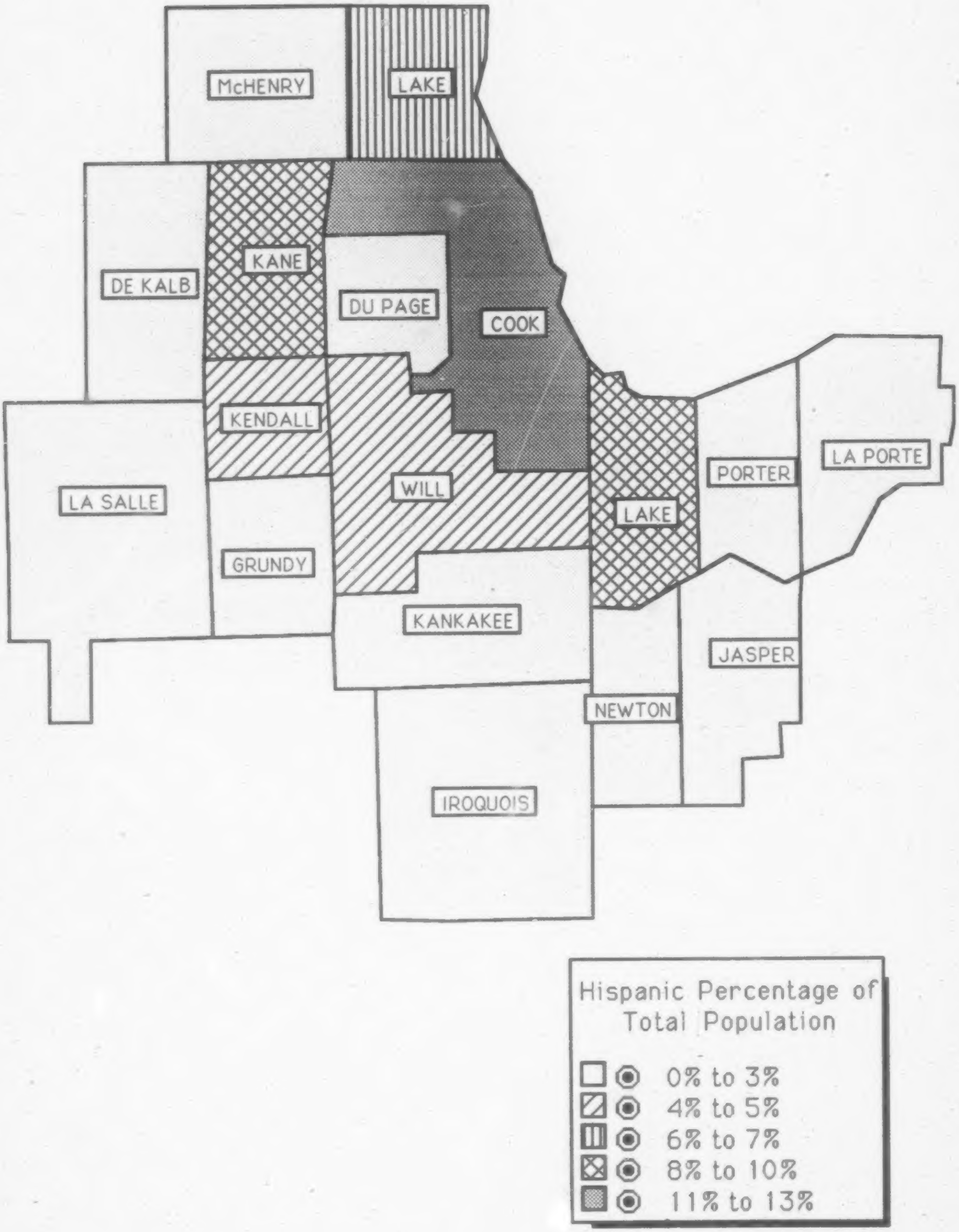
Since 1985, Cook County's Hispanic population experienced the highest growth rate of any county in the Chicago ADI, a percentage growth rate of 35%, and 56% since 1980.

**CHICAGO**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Cook | IL | 499.3 | 578.0 | 671.2 | 778.4 |
| DeKalb | IL | 1.4 | 1.5 | 1.9 | 1.9 |
| DuPage | IL | 17.3 | 22.0 | 29.6 | 31.3 |
| Grundy | IL | 0.5 | 0.6 | 0.9 | 1.0 |
| Iroquois | IL | 0.4 | 0.4 | 0.6 | 0.6 |
| Kane | IL | 26.1 | 31.5 | 40.1 | 42.4 |
| Kankakee | IL | 1.3 | 1.4 | 1.8 | 1.7 |
| Kendall | IL | 1.1 | 1.3 | 1.8 | 1.9 |
| Lake | IL | 21.1 | 25.1 | 32.4 | 34.7 |
| La Salle | IL | 2.5 | 2.7 | 3.5 | 3.5 |
| Livingston | IL | 0.6 | 0.7 | 1.0 | NA |
| McHenry | IL | 3.0 | 3.6 | 5.2 | 5.6 |

Continued...

# Chicago ADI


McHENRY
LAKE
DE KALB
KANE
DU PAGE
COOK
KENDALL
LA SALLE
WILL
GRUNDY
LAKE
PORTER
LA PORTE
KANKAKEE
JASPER
NEWTON
IROQUOIS
Hispanic Percentage of Total Population
☐ 0% to 3%
▨ 4% to 5%
▥ 6% to 7%
☒ 8% to 10%
▩ 11% to 13%

# CHICAGO
# HISPANIC POPULATION
# 1980, 1985, 1989, 1991

(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Will | IL | 13.8 | 15.9 | 21.5 | 22.5 |
| Jasper | IN | 0.3 | 0.3 | 0.4 | 0.3 |
| Lake | IN | 43.9 | 47.8 | 53.4 | 53.9 |
| La Porte | IN | 1.2 | 1.3 | 1.5 | 1.5 |
| Newton | IN | 0.1 | 0.1 | 0.1 | 0.1 |
| Porter | IN | 2.7 | 3.2 | 3.9 | 4.0 |
| Kenosha | IN | 3.6 | 4.0 | NA | NA |
| TOTAL | | 640.2 | 741.4 | 870.8 | 985.3 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

The 18 County ADI contains a total population of close to 10 million. The Hispanic population of the ADI represents 10% of its total population. Cook County has the greatest concentration of Hispanics, at 13% of its total population of 5.9 million.

The Chicago ADI consists of 285,500 Hispanic households. The average household size is approximately 3.5 persons. Cook County and Lake County, Indiana, represent 86% of the total Hispanic households in the ADI. The inclusion of the counties surrounding Cook County, such as DuPage, Kane, Will and Lake, Illinois, increases the Hispanic household percentage to 98% of total Hispanics in the ADI.

### CHICAGO
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Cook | IL | 778.4 | 229.0 | 13.1% | 5,942.3 |
| DeKalb | IL | 1.9 | 0.5 | 2.3 | 82.6 |
| DuPage | IL | 31.3 | 8.7 | 3.3 | 948.3 |
| Grundy | IL | 1.0 | 0.3 | 2.2 | 46.1 |
| Iroquois | IL | 0.6 | 0.2 | 1.5 | 40.8 |
| Kane | IL | 42.4 | 11.1 | 8.6 | 492.7 |
| Kankakee | IL | 1.7 | 0.5 | 1.5 | 113.3 |
| Kendall | IL | 1.9 | 0.5 | 3.7 | 51.4 |
| Lake | IL | 34.7 | 9.0 | 6.0 | 578.0 |
| La Salle | IL | 3.5 | 1.0 | 2.8 | 125.0 |
| McHenry | IL | 5.6 | 1.4 | 2.6 | 216.0 |
| Will | IL | 22.5 | 5.8 | 5.3 | 424.2 |
| Jasper | IN | 0.3 | 0.1 | 1.2 | 25.3 |
| Lake | IN | 53.9 | 15.9 | 9.2 | 585.5 |
| La Porte | IN | 1.5 | 0.4 | 1.2 | 125.0 |
| Newton | IN | 0.1 | * | 0.9 | 11.8 |
| Porter | IN | 4.0 | 1.1 | 2.5 | 160.0 |
| TOTAL | | 985.3 | 285.5 | 9.9% | 9,968.3 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Approximately 39% of the Chicago ADI population is under 18 years of age. An additional 36% are under 35 years of age. This makes the Chicago market a young market, with three-fourths of its population under 35 years of age. Of the total market, only 9% are 50 years of age or more.

Male is the dominant gender of the adult market, with a 32% distribution.

### CHICAGO
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 75.8 | | 7.7% | |
| Males 25-34 | 109.7 | | 11.1 | |
| Males 35-49 | 85.4 | | 8.7 | |
| Males 50-54 | 9.7 | | 1.0 | |
| Males 55-64 | 19.4 | | 2.0 | |
| Males 65+ | 14.0 | | 1.4 | |
| **Males 18+** | | **314.0** | | **31.9%** |
| Females 18-24 | 67.9 | | 6.9 | |
| Females 25-34 | 100.0 | | 10.1 | |
| Females 35-49 | 76.7 | | 7.8 | |
| Females 50-54 | 9.7 | | 1.0 | |
| Females 55-64 | 19.5 | | 2.0 | |
| Females 65+ | 14.3 | | 1.4 | |
| **Females 18+** | | **288.1** | | **29.2** |
| **Teens (12-17)** | 113.0 | **113.0** | 11.5 | **11.5** |
| **Children (0-11)** | | **270.2** | | **27.4** |
| Children (2-11) | 224.9 | | 22.8 | |
| TOTAL 2+ | 940.0 | | 95.4% | |
| **TOTAL** | | **985.3** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

Diverse Hispanic groups make up the Chicago Hispanic market. The market contains a truly heterogeneous mix of Mexicans, Puerto Ricans, and other Spanish subgroups. Mexicans are the leading Hispanic eithnic group, holding a 77% share of Hispanic households. Puerto Ricans comprise the second dominant group, making up approximately 20% of the Hispanic population base. Rounding out the Hispanic household population are persons whose origins are from Cuba, Central, and South America. All of the above makes Chicago an extremely popular test market for marketers and advertisers alike interested in the Hispanic market.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the Chicago market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS HISPANIC HOUSEHOLDS 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 30% | 85,650 |
| VCRs | 74% | 211,270 |
| Without Telephone | 26% | 74,230 |
| With Unlisted Telephone | 28% | 79,940 |
| Average Number of TV Sets Per Household | 2.1 | -- |

Source:Strategy Research Corporation

## MARKET 7

# HOUSTON

*MARKET SIZE: 859,300 HISPANIC POPULATION*

## 1. Hispanic Population

The Houston ADI is comprised of 20 counties, six of which comprise the Houston metropolitan area. Houston is the seventh largest Hispanic market in the United States.

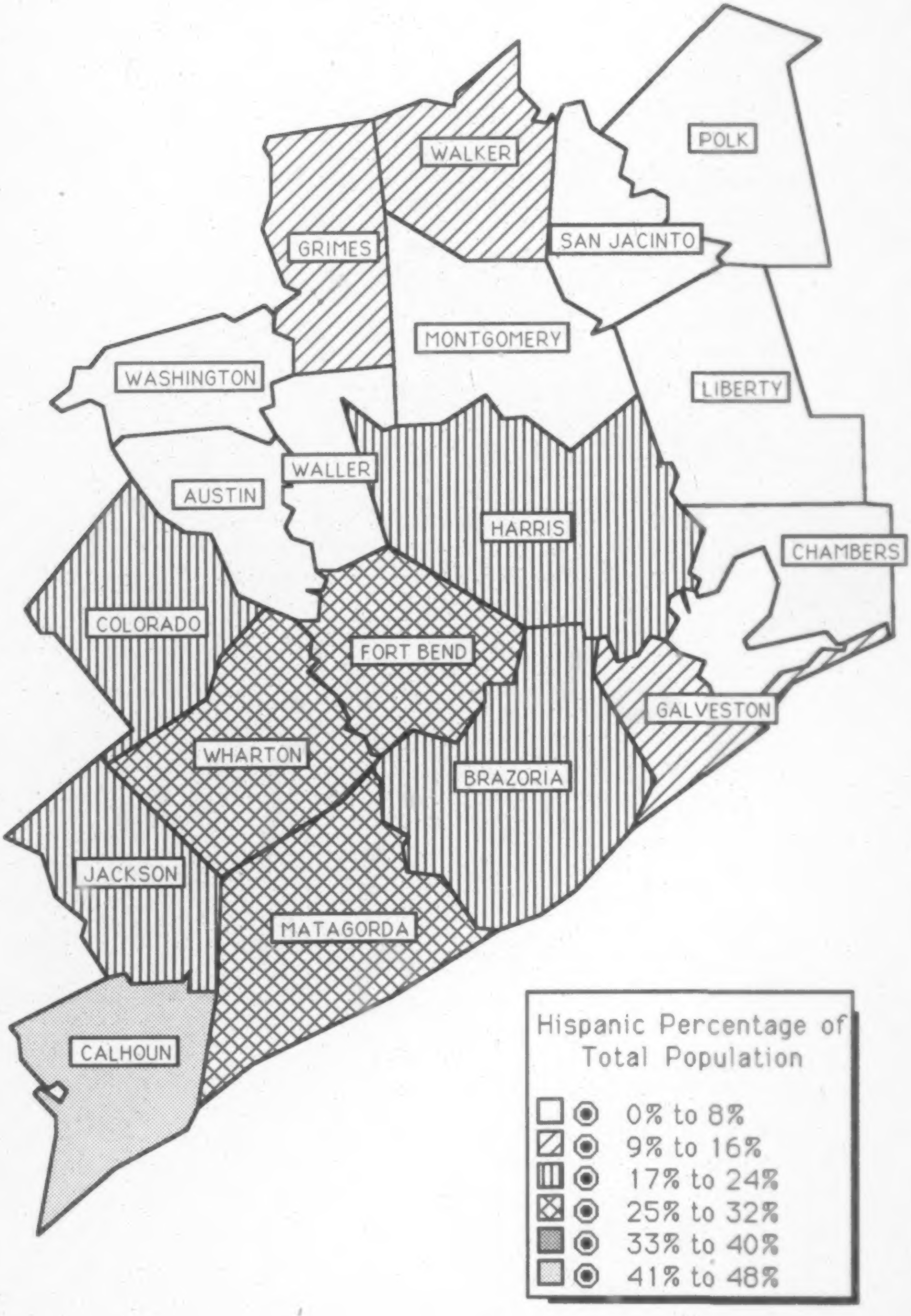
The current estimated Hispanic population of the Houston market is 859,300. Harris County, with a population of 649,400, is where 76% of the ADI's Hispanics reside.

### HOUSTON
### HISPANIC POPULATION
### 1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Austin | TX | 1.0 | 1.3 | 1.6 | 1.6 |
| Brazoria | TX | 22.7 | 30.0 | 41.5 | 42.3 |
| Calhoun | TX | 6.7 | 7.5 | 9.6 | 9.8 |
| Chambers | TX | 0.6 | 0.8 | 1.1 | 1.1 |
| Colorado | TX | 2.7 | 3.1 | 4.0 | 4.0 |
| Fort Bend | TX | 26.7 | 37.7 | 62.8 | 61.9 |
| Galveston | TX | 23.6 | 27.0 | 37.8 | 38.1 |
| Grimes | TX | 1.2 | 1.5 | 2.5 | 2.6 |
| Harris | TX | 369.1 | 464.8 | 621.9 | 649.4 |
| Jackson | TX | 2.5 | 2.8 | 3.3 | 3.3 |
| Liberty | TX | 1.1 | 1.3 | 1.8 | 1.8 |
| Matagorda | TX | 8.0 | 10.1 | 12.4 | 12.3 |
| Montgomery | TX | 4.3 | 6.0 | 8.1 | 8.5 |
| Polk | TX | 0.9 | 1.2 | 1.6 | 1.6 |
| San Jacinto | TX | 0.1 | 0.1 | 0.2 | 0.2 |

Continued...

# Houston ADI


POLK
WALKER
GRIMES
SAN JACINTO
MONTGOMERY
WASHINGTON
LIBERTY
WALLER
AUSTIN
HARRIS
CHAMBERS
COLORADO
FORT BEND
GALVESTON
WHARTON
BRAZORIA
JACKSON
MATAGORDA
CALHOUN
Hispanic Percentage of Total Population
☐ ◉ 0% to 8%
▨ ◉ 9% to 16%
▥ ◉ 17% to 24%
☒ ◉ 25% to 32%
▩ ◉ 33% to 40%
▤ ◉ 41% to 48%

## HOUSTON
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Trinity | TX | * | 0.1 | 0.1 | * |
| Walker | TX | 3.0 | 3.8 | 5.2 | 5.4 |
| Waller | TX | 1.1 | 1.4 | 1.8 | 2.0 |
| Washington | TX | 0.6 | 0.8 | 1.0 | 1.0 |
| Wharton | TX | 8.8 | 10.0 | 12.7 | 12.4 |
| TOTAL | | 484.7 | 611.3 | 831.0 | 859.3 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

The total population of the Houston ADI is estimated at approximately 4.6 million. Approximately 70% of the population resides in Harris County, where the city of Houston is located. Harris County has the greatest number of Hispanics among the ADI's counties, but is the sixth largest in terms of concentration with roughly 20% of this county's residents being of Hispanic origin or descent.

Calhoun County has the highest concentration of Hispanics at 42%.

There are an estimated 241,300 Hispanic households in the Houston ADI, with an average of 3.6 persons per household.

### HOUSTON
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Austin | TX | 1.6 | 0.4 | 6.9% | 23.2 |
| Brazoria | TX | 42.3 | 10.4 | 18.2 | 232.5 |
| Calhoun | TX | 9.8 | 2.7 | 41.9 | 23.4 |
| Chambers | TX | 1.1 | 0.3 | 4.1 | 26.8 |
| Colorado | TX | 4.0 | 1.1 | 18.4 | 21.7 |
| Fort Bend | TX | 61.9 | 15.4 | 25.1 | 246.6 |
| Galveston | TX | 38.1 | 11.4 | 14.9 | 255.7 |
| Grimes | TX | 2.6 | 0.6 | 11.6 | 22.4 |
| Harris | TX | 649.4 | 186.6 | 20.4 | 3,183.2 |
| Jackson | TX | 3.3 | 1.0 | 23.0 | 14.3 |
| Liberty | TX | 1.8 | 0.5 | 2.8 | 64.3 |
| Matagorda | TX | 12.3 | 3.4 | 26.0 | 47.3 |
| Montgomery | TX | 8.5 | 2.2 | 4.2 | 201.8 |
| Polk | TX | 1.6 | 0.4 | 4.9 | 32.7 |
| San Jacinto | TX | 0.2 | 0.1 | 1.1 | 18.2 |
| Trinity | TX | * | * | * | * |
| Walker | TX | 5.4 | 0.8 | 8.9 | 60.4 |
| Waller | TX | 2.0 | 0.5 | 7.2 | 27.2 |
| Washington | TX | 1.0 | 0.2 | 3.6 | 27.8 |
| Wharton | TX | 12.4 | 3.3 | 26.7 | 46.4 |
| TOTAL | | 859.3 | 241.3 | 18.8% | 4,575.9 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

There are slightly more adult males than adult females in this market, 32% compared to 30%, respectively. Overall, 73% of the market is under 35 years of age. The 18 to 34 year-old group comprises approximately 35% of the market.

### HOUSTON
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 66.5 | | 7.7% | |
| Males 25-34 | 96.6 | | 11.3 | |
| Males 35-49 | 67.5 | | 7.9 | |
| Males 50-54 | 10.4 | | 1.2 | |
| Males 55-64 | 20.9 | | 2.4 | |
| Males 65+ | 15.8 | | 1.8 | |
| **Males 18+** | | **277.7** | | **32.3%** |
| Females 18-24 | 57.2 | | 6.6 | |
| Females 25-34 | 84.0 | | 9.8 | |
| Females 35-49 | 67.7 | | 7.9 | |
| Females 50-54 | 10.6 | | 1.2 | |
| Females 55-64 | 21.0 | | 2.4 | |
| Females 65+ | 15.9 | | 1.9 | |
| **Females 18+** | | **256.4** | | **29.8** |
| **Teens (12-17)** | 109.8 | **109.8** | 12.8 | **12.8** |
| **Children (0-11)** | | **215.4** | | **25.1** |
| Children (2-11) | 180.4 | | 21.0 | |
| TOTAL 2+ | 824.3 | | 95.9% | |
| **TOTAL** | | **859.3** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

Approximately 97% of the Houston Hispanic market is of Mexican origin/descent.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the Houston market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS
### HISPANIC HOUSEHOLDS
### 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 35% | 84,455 |
| VCRs | 60% | 144,780 |
| Without Telephone | 30% | 72,390 |
| With Unlisted Telephone | 19% | 45,847 |
| Average Number of TV Sets Per Household | 2.1 | -- |

Source:Strategy Research Corporation

## MARKET 8

# McALLEN/BROWNSVILLE

*MARKET SIZE: 697,900 HISPANIC POPULATION*

### 1. Hispanic Population

The McAllen/Brownsville ADI is located on the Texas-Mexico border. It is the eighth largest Hispanic market in the United States with a 1991 estimated total Hispanic population of 697,900. The ADI consists of four counties, of which two contain 90% of its total Hispanic population: Cameron and Hidalgo. Their combined estimated Hispanic population for 1991 is 629,400.

Hidalgo County, where the City of Brownsville is located, has the ADI's largest estimated 1991 Hispanic population, at 383,600. Its growth rate since 1985 was 32%, and 67% since 1980.

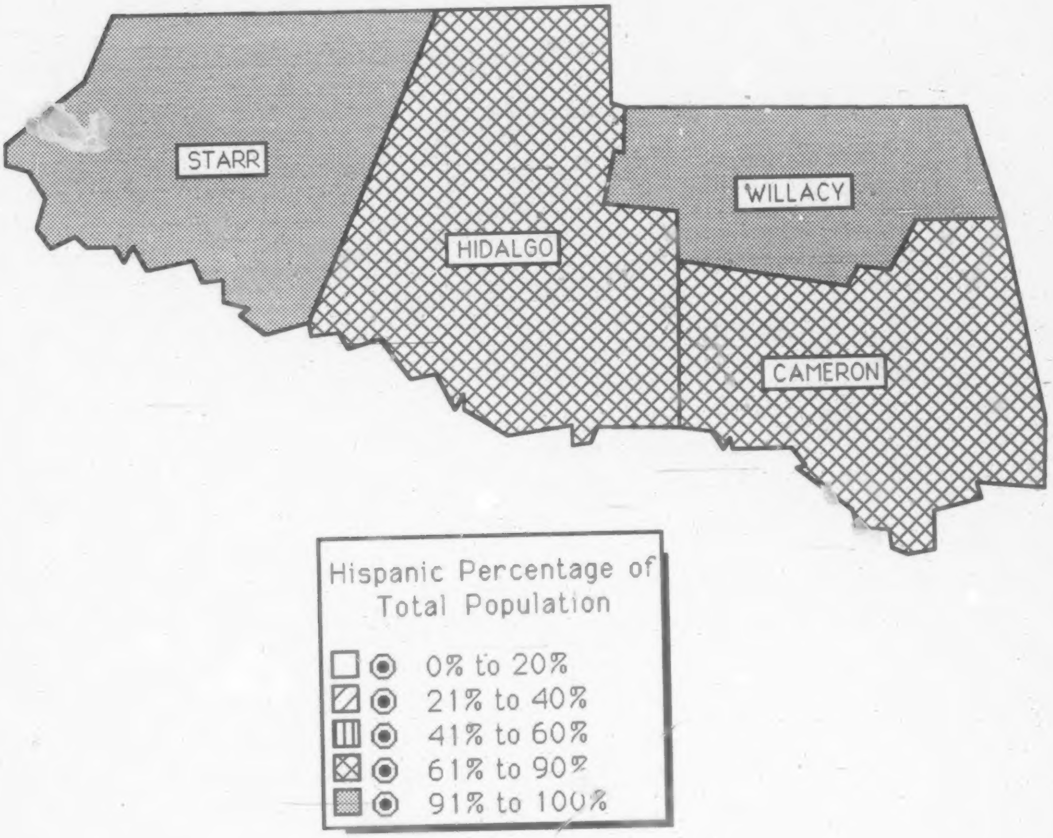
McAllen is located in Cameron County, the second most populated County of the ADI. It has an estimated Hispanic population of 245,800 that experienced an increase of 24% since 1985 and 52% since 1980.

**McALLEN/BROWNSVILLE**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Cameron | TX | 161.6 | 197.9 | 239.2 | 245.8 |
| Hidalgo | TX | 230.2 | 289.7 | 366.8 | 383.6 |
| Starr | TX | 26.4 | 34.0 | 42.7 | 47.2 |
| Willacy | TX | 14.0 | 16.2 | 20.5 | 21.3 |
| TOTAL | | 432.2 | 537.8 | 669.2 | 697.9 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# McAllen/Brownsville ADI


STARR
HIDALGO
WILLACY
CAMERON
Hispanic Percentage of Total Population
0% to 20%
21% to 40%
41% to 60%
61% to 90%
91% to 100%

## 2. Hispanic Population/Households - Total Population

The McAllen/Brownsville ADI currently contains an estimated total population of 793,300. The ADI ranks second in the U.S. after Laredo, Texas in terms of Hispanic popoulation concentration. Out of every ten people that live in this ADI, nine are of Hispanic origin or descent. Hispanic concentrations are even heavier in the two smaller populated counties, Starr and Willacy.

There are an estimated 175,300 Hispanic households in the ADI, of which 95,200 are located in Hidalgo County. The ADI is comprised of Hispanic households that are populated with an average of 4 people.

### McALLEN/BROWNSVILLE
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Cameron | TX | 245.8 | 62.8 | 85.2% | 288.5 |
| Hidalgo | TX | 383.6 | 95.2 | 88.6 | 432.9 |
| Starr | TX | 47.2 | 12.1 | 97.2 | 48.5 |
| Willacy | TX | 21.3 | 5.2 | 91.0 | 23.4 |
| TOTAL | | 697.9 | 175.3 | 88.0% | 793.3 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

There are more adult females in this market than there are adult males, 228,400 versus 199,900. Typically, it is also a young market, as 39% are under 18, and an additional 29% are between 18-34.

### McALLEN/BROWNSVILLE HISPANIC AGE/SEX DISTRIBUTION

### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 40.8 | | 5.8% | |
| Males 25-34 | 58.5 | | 8.4 | |
| Males 35-49 | 46.9 | | 6.7 | |
| Males 50-54 | 11.8 | | 1.7 | |
| Males 55-64 | 23.5 | | 3.4 | |
| Males 65+ | 18.4 | | 2.6 | |
| **Males 18+** | | **199.9** | | **28.6%** |
| Females 18-24 | 42.0 | | 6.0 | |
| Females 25-34 | 60.7 | | 8.7 | |
| Females 35-49 | 56.5 | | 8.1 | |
| Females 50-54 | 15.2 | | 2.2 | |
| Females 55-64 | 30.2 | | 4.3 | |
| Females 65+ | 23.8 | | 3.4 | |
| **Females 18+** | | **228.4** | | **32.7** |
| **Teens (12-17)** | 89.1 | **89.1** | 12.8 | **12.8** |
| **Children (0-11)** | | **180.5** | | **25.9** |
| Children (2-11) | 149.7 | | 21.5 | |
| TOTAL 2+ | 667.1 | | 95.6% | |
| **TOTAL** | | **697.9** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

Ninety-nine percent of the Hispanics in the McAllen/Brownsville market are of Mexican origin, not surprising, given the area's close proximity to the Mexican border.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the McAllen/Brownsville market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS HISPANIC HOUSEHOLDS 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 45% | 78,885 |
| VCRs | 61% | 106,933 |
| Without Telephone | 22% | 38,566 |
| With Unlisted Telephone | 31% | 54,343 |
| Average Number of TV Sets Per Household | 1.8 | -- |

Source:Strategy Research Corporation

## MARKET 9

# ALBUQUERQUE

*MARKET SIZE: 615,700 HISPANIC POPULATION*

### 1. Hispanic Population

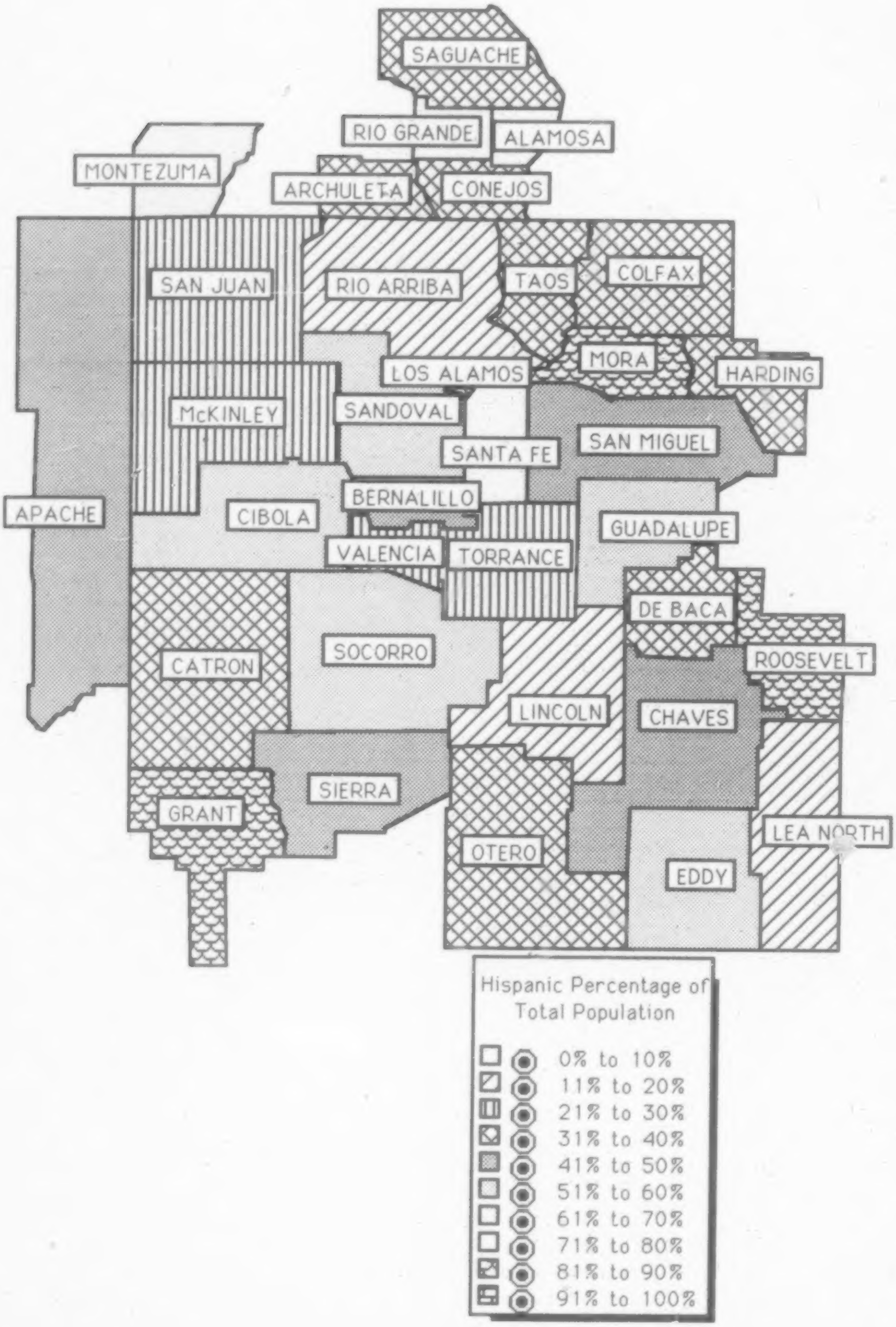
For 1991, Strategy Research Corporation's estimate of the Hispanic population of the Albuquerque ADI is 615,700, making this market the ninth largest Hispanic ADI in the United States. Albuquerque's 1991 Hispanic population represents a 71% increase since 1980.

Albuquerque's metropolitan area consists of Sandoval and Bernalillo Counties. Together, these two counties account for 251,100, or 41% of the 1991 estimated Hispanic population of the Albuquerque ADI.

After Bernalillo County, the greatest number of Hispanics can be found in Santa Fe County, where 61,700 Hispanics live, or approximately 10% of the ADI's total. In general, however, Albuquerque is a typical Hispanic market in that most of the population is not concentrated in the city or metropolitan area. Specifically, 59% of this market's Hispanic residents make their homes outside of the metro area, with large numbers in San Miguel, Rio Arriba, and Santa Fe Counties.

Overall, within the last six years the Hispanic population of the Albuquerque market has seen an increase of 193,500 persons, or 46%.

# Albuquerque ADI


SAGUACHE
RIO GRANDE
ALAMOSA
MONTEZUMA
ARCHULETA
CONEJOS
SAN JUAN
RIO ARRIBA
TAOS
COLFAX
LOS ALAMOS
MORA
HARDING
McKINLEY
SANDOVAL
SANTA FE
SAN MIGUEL
APACHE
CIBOLA
BERNALILLO
GUADALUPE
VALENCIA
TORRANCE
DE BACA
CATRON
SOCORRO
ROOSEVELT
LINCOLN
CHAVES
SIERRA
GRANT
OTERO
LEA NORTH
EDDY
Hispanic Percentage of Total Population
0% to 10%
11% to 20%
21% to 30%
31% to 40%
41% to 50%
51% to 60%
61% to 70%
71% to 80%
81% to 90%
91% to 100%

## ALBUQUERQUE
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Apache North | AZ | 1.4 | 2.1 | 2.6 | 2.9 |
| Alamosa | CO | 3.8 | NA | 4.3 | 4.9 |
| Archuleta | CO | 1.1 | 1.3 | 1.6 | 1.6 |
| Conejos | CO | 4.8 | 5.0 | 5.3 | 5.7 |
| Costilla | CO | 2.4 | 2.5 | 3.1 | NA |
| Dolores | CO | * | NA | NA | NA |
| La Plata | CO | 3.1 | 3.4 | NA | NA |
| Mineral | CO | NA | * | * | NA |

Continued...

## ALBUQUERQUE
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Montezuma | CO | 1.4 | 1.5 | 1.9 | 1.8 |
| Rio Grande | CO | 3.9 | 4.1 | 4.4 | 4.7 |
| Saguache | CO | 1.6 | NA | 1.6 | 1.6 |
| Bernalillo | NM | 154.6 | 183.0 | 206.8 | 229.7 |
| Catron | NM | NA | 0.8 | 0.9 | 0.9 |
| Cibola | NM | NA | 14.5 | 15.0 | 10.5 |
| Colfax | NM | 6.5 | 6.7 | 7.6 | 7.8 |
| De Baca | NM | NA | NA | 0.9 | 0.9 |
| Eddy | NM | NA | NA | 19.6 | 19.9 |
| Grant | NM | 13.5 | 14.0 | 17.3 | 18.3 |
| Guadalupe | NM | 3.7 | 3.9 | 4.2 | 4.2 |
| Harding | NM | 0.5 | 0.5 | 0.5 | 0.4 |
| Lincoln | NM | 2.9 | 3.3 | 5.5 | 5.5 |
| Los Alamos | NM | 2.0 | 2.2 | 2.7 | 2.6 |
| McKinley | NM | 7.5 | 8.2 | 12.0 | 12.2 |
| Mora | NM | 3.6 | 3.7 | 5.5 | 5.3 |
| Otero | NM | NA | 10.0 | 13.3 | 14.0 |
| Rio Arriba | NM | 21.8 | 22.5 | 30.7 | 31.7 |
| Sandoval | NM | 9.6 | 10.9 | 17.1 | 21.4 |
| San Juan | NM | NA | 11.0 | 14.9 | 14.5 |
| San Miguel | NM | 18.5 | 18.8 | 25.0 | 25.4 |
| Santa Fe | NM | 41.8 | 46.4 | 61.1 | 61.7 |
| Sierra | NM | 2.1 | 2.2 | 3.1 | 3.4 |

Continued. . .

## ALBUQUERQUE
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Socorro | NM | 5.9 | 6.1 | 8.0 | 8.2 |
| Taos | NM | 12.5 | 13.1 | 19.6 | 19.5 |
| Torrance | NM | 3.1 | 3.5 | 4.9 | 5.4 |
| Chaves | NM | NA | NA | NA | 20.2 |
| Lea North | NM | NA | NA | NA | 13.6 |
| Roosevelt | NM | NA | NA | NA | 4.4 |
| Valencia | NM | 26.9 | 17.0 | 28.6 | 30.9 |
| TOTAL | | 360.5 | 422.2 | 549.6 | 615.7 |

NA = Not Applicable

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

Overall, the Albuquerque ADI is 38% Hispanic, with a total population of 1.6 million and a Hispanic population consisting of 615,700 persons. The metropolitan area (Bernalillo and Sandoval Counties) is 40% Hispanic.

Bernalillo, Albuquerque's largest county in terms of number of Hispanic residents (229,700), has a Hispanic population density of 42%, while Santa Fe County (61,700 Hispanic residents) is 60% Hispanic.

The county most saturated with Hispanics is Mora County, where 94% of the population is Hispanic. Overall, twelve of the thirty-six counties that make up this ADI contain Hispanic population densities of at least 50%. Besides Mora County, high proportions of Hispanics live in Guadalupe (90%), San Miquel (88%), and Rio Arriba (81%).

### ALBUQUERQUE
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Apache North | AZ | 2.9 | 0.8 | 4.4% | 66.4 |
| Alamosa | CO | 4.9 | 1.7 | 34.0 | 14.3 |
| Archuleta | CO | 1.6 | 0.6 | 33.3 | 4.8 |
| Conejos | CO | 5.7 | 2.0 | 64.0 | 8.9 |
| Mineral | CO | * | * | * | * |
| Montezuma | CO | 1.8 | 0.6 | 10.0 | 18.0 |
| Rio Grande | CO | 4.7 | 1.4 | 38.6 | 12.2 |
| Saguache | CO | 1.6 | 0.5 | 43.7 | 3.7 |
| Bernalillo | NM | 229.7 | 75.3 | 41.6 | 552.2 |
| Catron | NM | 0.9 | 0.3 | 32.6 | 2.8 |
| Cibola | NM | 10.5 | 3.3 | 41.8 | 25.1 |
| Colfax | NM | 7.8 | 2.6 | 53.1 | 14.6 |
| De Baca | NM | 0.9 | 0.4 | 36.7 | 2.5 |
| Eddy | NM | 19.9 | 5.6 | 35.2 | 56.5 |
| Grant | NM | 18.3 | 5.7 | 57.5 | 31.8 |
| Guadalupe | NM | 4.2 | 1.5 | 90.0 | 4.7 |
| Harding | NM | 0.4 | 0.2 | 50.6 | 0.8 |
| Lincoln | NM | 5.5 | 1.8 | 30.6 | 18.0 |
| Los Alamos | NM | 2.6 | 0.8 | 12.9 | 20.2 |
| McKinley | NM | 12.2 | 3.8 | 15.1 | 80.8 |

Continued...

## ALBUQUERQUE
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Mora | NM | 5.3 | 1.7 | 94.6 | 5.6 |
| Otero | NM | 14.0 | 4.1 | 24.8 | 56.6 |
| Rio Arriba | NM | 31.7 | 10.4 | 80.6 | 39.3 |
| Sandoval | NM | 21.4 | 6.8 | 31.0 | 69.0 |
| San Juan | NM | 14.5 | 4.8 | 13.4 | 108.2 |
| San Miguel | NM | 25.4 | 8.6 | 88.3 | 28.8 |
| Santa Fe | NM | 61.7 | 20.8 | 59.5 | 103.7 |
| Sierra | NM | 3.4 | 1.1 | 30.0 | 11.3 |
| Socorro | NM | 8.2 | 2.7 | 50.3% | 16.3 |
| Taos | NM | 19.5 | 6.2 | 73.0 | 26.7 |
| Torrance | NM | 5.4 | 1.7 | 45.3 | 11.9 |
| Chaves | NM | 20.2 | 5.8 | 34.4 | 58.7 |
| Lea North | NM | 13.6 | 3.5 | 21.6 | 62.8 |
| Roosevelt | NM | 4.4 | 1.2 | 25.3 | 11.1 |
| Valencia | NM | 30.9 | 9.6 | 56.3 | 54.9 |
| TOTAL | | 615.7 | 197.9 | 38.4% | 1,603.3 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

As previously mentioned, Albuquerque is a market whose Hispanic population is rapidly growing. A rapid growth rate should continue into the future based on the ADI's age demographics. Specifically, 68% of the Hispanic population is under 35 years of age and 40% is under 18 years of age. Furthermore, 27% is under twelve years of age.

### ALBUQUERQUE
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 36.0 | | 5.8% | |
| Males 25-34 | 51.4 | | 8.3 | |
| Males 35-49 | 41.0 | | 6.7 | |
| Males 50-54 | 10.5 | | 1.7 | |
| Males 55-64 | 21.3 | | 3.5 | |
| Males 65+ | 16.2 | | 2.6 | |
| **Males 18+** | | **176.4** | | **28.6%** |
| Females 18-24 | 36.6 | | 6.0 | |
| Females 25-34 | 51.9 | | 8.4 | |
| Females 35-49 | 46.8 | | 7.6 | |
| Females 50-54 | 12.3 | | 2.0 | |
| Females 55-64 | 24.8 | | 4.0 | |
| Females 65+ | 19.4 | | 3.2 | |
| **Females 18+** | | **191.8** | | **31.2** |
| **Teens (12-17)** | 83.8 | **83.8** | 13.6 | **13.6** |
| **Children (0-11)** | | **163.7** | | **26.6** |
| Children (2-11) | 135.6 | | 22.0 | |
| TOTAL 2+ | 587.6 | | 95.4% | |
| **TOTAL** | | **615.7** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country of Origin

The vast majority (95%) of Hispanics in the Albuquerque ADI are of Mexican descent.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the Albuquerque market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS HISPANIC HOUSEHOLDS 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 20% | 39,580 |
| VCRs | 64% | 126,656 |
| Without Telephone | 20% | 39,580 |
| With Unlisted Telephone | 31% | 61,349 |
| Average Number of TV Sets Per Household | 2.4 | -- |

Source:Strategy Research Corporation

## MARKET 10

# EL PASO

*MARKET SIZE: 583,500 HISPANIC POPULATION*

### 1. Hispanic Population

The estimated 1991 Hispanic population for the El Paso ADI is 583,500 persons. Since 1980, the market's Hispanic population has increased 60%, or by 218,800 persons.

Approximately 84% of the market's Hispanics live in El Paso County, with another 14% living in Dona Ana. Together, both counties account for 572,800 of the 583,500 Hispanic persons living in the El Paso ADI.

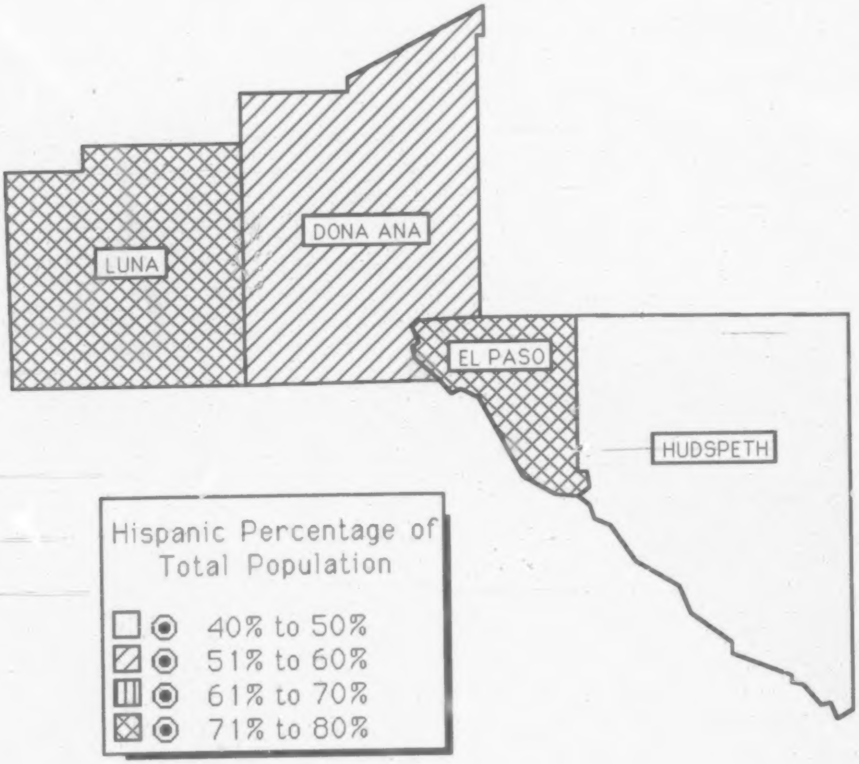
**EL PASO**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Doña Ana | NM | 50.2 | 58.4 | 76.3 | 81.7 |
| Hidalgo | NM | NA | NA | 3.5 | NA |
| Luna | NM | 6.2 | 6.7 | 8.2 | 8.1 |
| Otero | NM | 9.7 | 2.5 | NA | NA |
| Culberson | TX | NA | NA | 3.0 | NA |
| El Paso | TX | 297.0 | 349.8 | 475.9 | 491.1 |
| Hudspeth | TX | 1.6 | 1.8 | 2.2 | 2.6 |
| TOTAL | | 364.7 | 419.2 | 569.1 | 583.5 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# El Paso ADI


LUNA
DONA ANA
EL PASO
HUDSPETH
Hispanic Percentage of Total Population
☐ ◉ 40% to 50%
▨ ◉ 51% to 60%
▥ ◉ 61% to 70%
☒ ◉ 71% to 80%

## 2. Hispanic Population/Households - Total Population

Currently, 71% of the metropolitan population (El Paso County) is of Hispanic origin/descent (491,100 Hispanics and 696,500 total persons).

Of the 156,700 Hispanic households in this market, 129,600 (83%) are located in El Paso County. Furthermore, these 156,700 households are home to 583,500 Hispanics, which equates to an average of 3.7 persons per household.

### EL PASO
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Doña Ana | NM | 81.7 | 24.1 | 59.1% | 138.3 |
| Hidalgo | NM | NA | NA | NA | NA |
| Luna | NM | 8.1 | 2.3 | 44.0 | 18.3 |
| Culberson | TX | NA | NA | NA | NA |
| El Paso | TX | 491.1 | 129.6 | 70.5 | 696.5 |
| Hudspeth | TX | 2.6 | 0.7 | 71.7 | 3.7 |
| TOTAL | | 583.5 | 156.7 | 68.1% | 856.8 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Among all Hispanics in the El Paso ADI, 71% are under 35 years of age, while one third (33%) are children under 18 years. This is a relatively youthful market, as a full 29% of the Hispanic population is under 12 years of age.

As far as the gender distribution of the Hispanic market is concerned, adult females make up a higher percentage of the total (31%) , as compared with adult males, who comprise 27% of the Hispanic base.

### EL PASO
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 32.9 | | 5.6% | |
| Males 25-34 | 47.7 | | 8.2 | |
| Males 35-49 | 41.4 | | 7.1 | |
| Males 50-54 | 7.4 | | 1.3 | |
| Males 55-64 | 14.9 | | 2.6 | |
| Males 65+ | 11.2 | | 1.9 | |
| **Males 18+** | | **155.5** | | **26.7%** |
| Females 18-24 | 34.0 | | 5.8 | |
| Females 25-34 | 49.3 | | 8.4 | |
| Females 35-49 | 49.4 | | 8.5 | |
| Females 50-54 | 10.1 | | 1.7 | |
| Females 55-64 | 20.3 | | 3.5 | |
| Females 65+ | 15.7 | | 2.7 | |
| **Females 18+** | | **178.8** | | **30.6** |
| **Teens (12-17)** | 80.1 | **80.1** | 13.7 | **13.7** |
| **Children (0-11)** | | **169.1** | | **29.0** |
| Children (2-11)⁻ | 139.8 | | 24.0 | |
| TOTAL 2+ | 554.2 | | 95.0% | |
| **TOTAL** | | **583.5** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

Mexicans compose the predominant group of Hispanics in the El Paso market, representing 99% of the Hispanic population. El Paso is another border market which owes its high concentration of Mexicans to its close proximity to Mexico.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the El Paso market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status and Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS
### HISPANIC HOUSEHOLDS
### 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 22% | 34,474 |
| VCRs | 55% | 86,185 |
| Without Telephone | 30% | 47,010 |
| With Unlisted Telephone | 32% | 50,144 |
| Average Number of TV Sets Per Household | 2.0 | -- |

Source:Strategy Research Corporation

## MARKET 11

# SAN DIEGO

*MARKET SIZE: 543,700 HISPANIC POPULATION*

### 1. Hispanic Population

The San Diego ADI is synonymous with the San Diego metropolitan area, which is comprised of San Diego County.

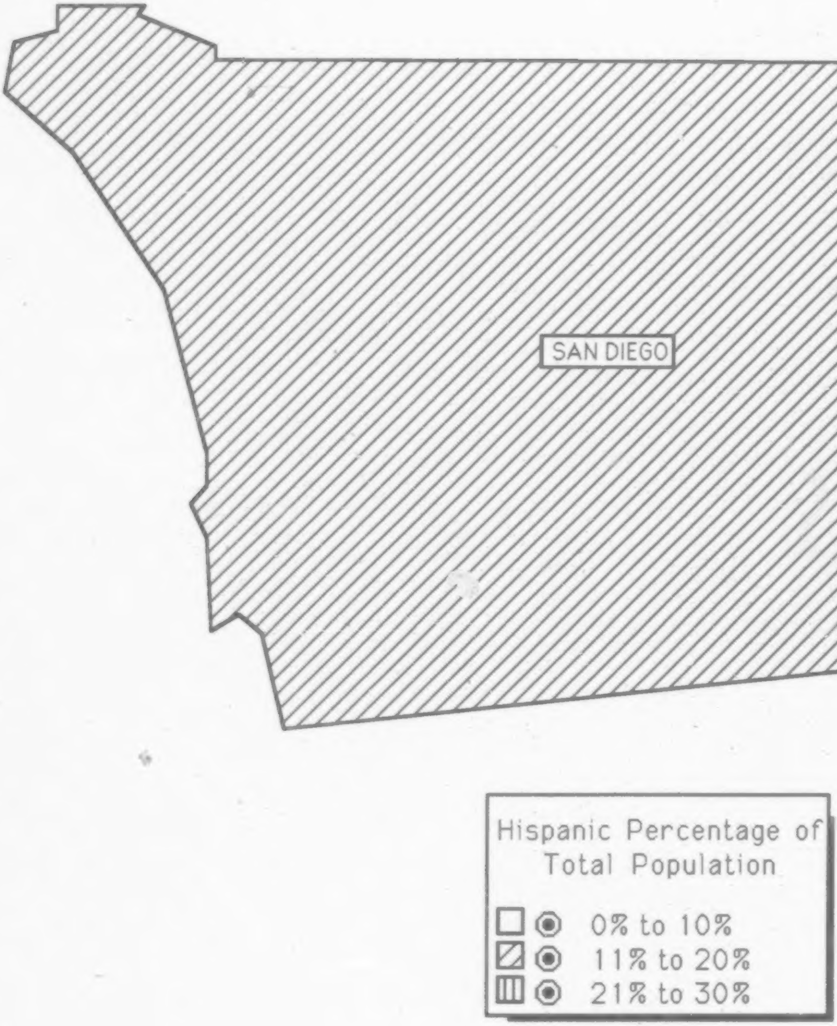
The estimated 1991 Hispanic population of this California market stands at 543,700 persons, a 15% increase from two years ago and a 60% growth from 1985. In the eleven year period spanning from 1980, the San Diego ADI has experienced a 98% Hispanic population explosion, with 268,500 more Hispanics living there now compared to 1980.

**SAN DIEGO**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| San Diego | CA | 275.2 | 340.1 | 473.8 | 543.7 |
| TOTAL | | 275.2 | 340.1 | 473.8 | 543.7 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# San Diego ADI


SAN DIEGO
Hispanic Percentage of Total Population
☐ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%

## 2. Hispanic Population/Households - Total Population

According to Strategy Research Corporation's 1991 projections, Hispanics comprise approximately 19% of the total population of the San Diego ADI (543,700 Hispanics and 2.9 million total persons).

There are 142,000 Hispanic households in the San Diego ADI. With a Hispanic population of 543,700, the average Hispanic household in the San Diego market contains 3.8 members.

### SAN DIEGO
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| San Diego | CA | 543.7 | 142.0 | 18.7% | 2,907.3 |
| TOTAL | | 543.7 | 142.0 | 18.7% | 2,907.3 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The San Diego market is a young one, as 73% of the Hispanic population is under 35 years of age, and 37% are under 18 years of age.

The adult Hispanic market in the San Diego ADI has a slightly higher proportion of males, who make up 33% of the market, compared to females who comprise 30% of the ADI's Hispanic population.

**SAN DIEGO**
**HISPANIC AGE/SEX DISTRIBUTION**
**1991**

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 45.1 | | 8.3% | |
| Males 25-34 | 65.3 | | 12.0 | |
| Males 35-49 | 42.2 | | 7.7 | |
| Males 50-54 | 6.5 | | 1.2 | |
| Males 55-64 | 12.9 | | 2.4 | |
| Males 65+ | 9.0 | | 1.7 | |
| **Males 18+** | | **181.0** | | **33.3%** |
| Females 18-24 | 33.0 | | 6.1 | |
| Females 25-34 | 48.8 | | 9.0 | |
| Females 35-49 | 45.2 | | 8.3 | |
| Females 50-54 | 7.3 | | 1.3 | |
| Females 55-64 | 14.6 | | 2.7 | |
| Females 65+ | 11.4 | | 2.1 | |
| **Females 18+** | | **160.3** | | **29.5** |
| **Teens (12-17)** | 67.3 | **67.3** | 12.4 | **12.4** |
| **Children (0-11)** | | **135.1** | | **24.8** |
| Children (2-11) | 112.9 | | 20.8 | |
| TOTAL 2+ | 521.5 | | 96.0% | |
| **TOTAL** | | **543.7** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

More than nine out of ten (94%) Hispanics in the San Diego ADI are from Mexico or have ancestors from Mexico.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the San Diego market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS
### HISPANIC HOUSEHOLDS
### 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 67% | 95,140 |
| VCRs | 73% | 103,660 |
| Without Telephone | 31% | 44,020 |
| With Unlisted Telephone | 33% | 46,860 |
| Average Number of TV Sets Per Household | 2.1 | -- |

Source:Strategy Research Corporation

Compared to other markets with similar information available, San Diego Hispanics register the highest percentage of cable television ownership at 67%.

## MARKET 12

# FRESNO

*MARKET SIZE: 542,000 HISPANIC POPULATION*

### 1. Hispanic Population

Strategy Research Corporation estimates that in 1991 the Fresno ADI has a Hispanic population of 542,000 persons, making it the twelfth largest Hispanic market in the United States. Since 1989, the Hispanic population of this six-county market has jumped 7%, and since 1980 the Hispanic population has increased by 84%.

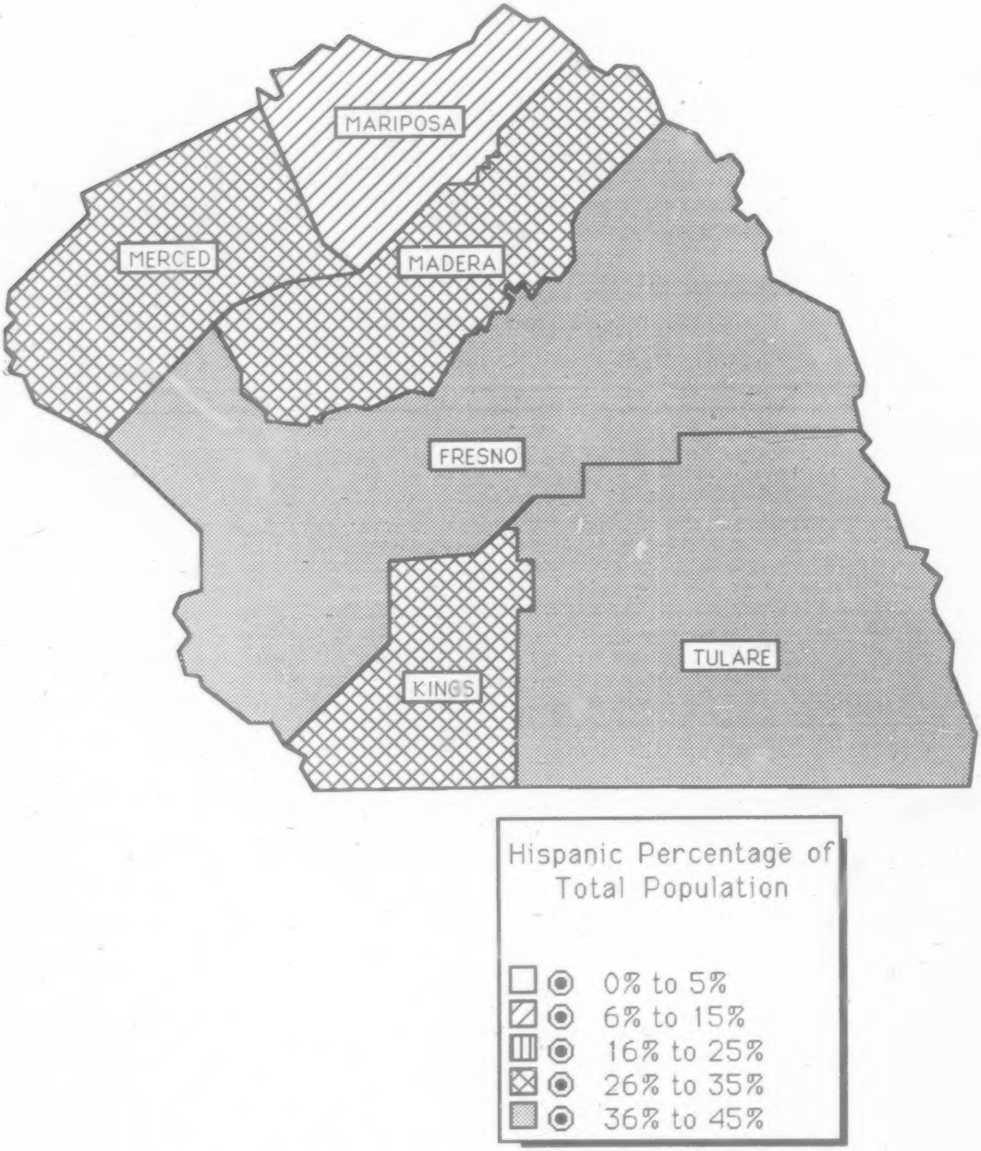
Almost half (49%) of the Fresno market's total Hispanic population is located in Fresno County itself, while another 25% is located in Tulare County.

**FRESNO**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Fresno | CA | 150.8 | 187.4 | 247.3 | 265.8 |
| Kings | CA | 19.8 | 24.3 | 34.6 | 37.2 |
| Madera | CA | 16.9 | 22.2 | 31.2 | 33.2 |
| Mariposa | CA | 0.5 | 0.8 | 1.3 | 1.3 |
| Merced | CA | 34.1 | 42.5 | 64.0 | 67.7 |
| Tulare | CA | 73.3 | 91.9 | 129.1 | 136.8 |
| TOTAL | | 295.4 | 369.1 | 507.5 | 542.0 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Fresno ADI


MARIPOSA
MERCED
MADERA
FRESNO
KINGS
TULARE
Hispanic Percentage of Total Population
☐ ◉ 0% to 5%
▨ ◉ 6% to 15%
▥ ◉ 16% to 25%
☒ ◉ 26% to 35%
▩ ◉ 36% to 45%

## 2. Hispanic Population/Households - Total Population

Overall, estimated 1.6 million persons have chosen residency in the Fresno ADI. With a Hispanic population of 542,000 persons, this makes the market 34% Hispanic.

With the exception of Mariposa County, where 6% of the population is Hispanic, all other counties within this ADI are at least 30% Hispanic. Tulare County is the most densely Hispanic, with 37% of its population being of Hispanic origin or descent.

An estimated 141,100 households in the Fresno ADI are headed by Hispanics. Over half (51%) of these households are located within Fresno County, with another 24% in Tulare County. There are an average of 3.8 people per Hispanic household in this market.

### FRESNO
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Fresno | CA | 265.8 | 72.2 | 35.5% | 748.9 |
| Kings | CA | 37.2 | 9.8 | 32.3 | 115.2 |
| Madera | CA | 33.2 | 8.3 | 32.3 | 102.9 |
| Mariposa | CA | 1.3 | 0.3 | 5.9 | 22.0 |
| Merced | CA | 67.7 | 17.0 | 30.5 | 221.8 |
| Tulare | CA | 136.8 | 33.5 | 36.7 | 372.7 |
| TOTAL | | 542.0 | 141.1 | 34.2% | 1,583.5 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The Fresno ADI is a very young market, best exemplified by the fact that 42% of the Hispanic population is under 18 years of age. Moreover, 73% of the market's Hispanics are under 35 years of age.

Only 4% of the Hispanic population of the Fresno market is of retirement age (65+).

### FRESNO
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 36.3 | | 6.7% | |
| Males 25-34 | 53.1 | | 9.8 | |
| Males 35-49 | 40.2 | | 7.4 | |
| Males 50-54 | 7.3 | | 1.3 | |
| Males 55-64 | 14.6 | | 2.7 | |
| Males 65+ | 11.2 | | 2.1 | |
| **Males 18+** | | **162.7** | | **30.0%** |
| Females 18-24 | 32.8 | | 6.0 | |
| Females 25-34 | 48.4 | | 8.9 | |
| Females 35-49 | 39.9 | | 7.4 | |
| Females 50-54 | 6.9 | | 1.3 | |
| Females 55-64 | 14.1 | | 2.6 | |
| Females 65+ | 10.6 | | 2.0 | |
| **Females 18+** | | **152.7** | | **28.2** |
| **Teens (12-17)** | 76.0 | **76.0** | 14.0 | **14.0** |
| **Children (0-11)** | | **150.6** | | **27.8** |
| Children (2-11) | 125.4 | | 23.1 | |
| TOTAL 2+ | 516.8 | | 95.3% | |
| **TOTAL** | | **542.0** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

Approximately 98% of all Hispanics residing in the Fresno ADI are of Mexican origin or descent.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the Fresno market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS
### HISPANIC HOUSEHOLDS
### 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 43% | 60,673 |
| VCRs | 66% | 93,126 |
| Without Telephone | 26% | 36,686 |
| With Unlisted Telephone | 37% | 52,207 |
| Average Number of TV Sets Per Household | 2.0 | -- |

Source:Strategy Research Corporation

## MARKET 13

# DALLAS/FT. WORTH

*MARKET SIZE: 525,700 HISPANIC POPULATION*

### 1. Hispanic Population

Composed of thirty-eight counties, the Dallas/Ft. Worth ADI is home to 525,700 Hispanics, ranking it the thirteenth largest Hispanic market in the United States. The market's Hispanic population has increased 5% from two years ago, and grown 97% since 1980.

Well over half (58%) of the market's 525,700 Hispanic residents live in Dallas County. Another 132,000 Hispanics reside in Tarrant County. Combined, these two counties account for 83% of the Dallas/Ft. Worth Hispanic population.

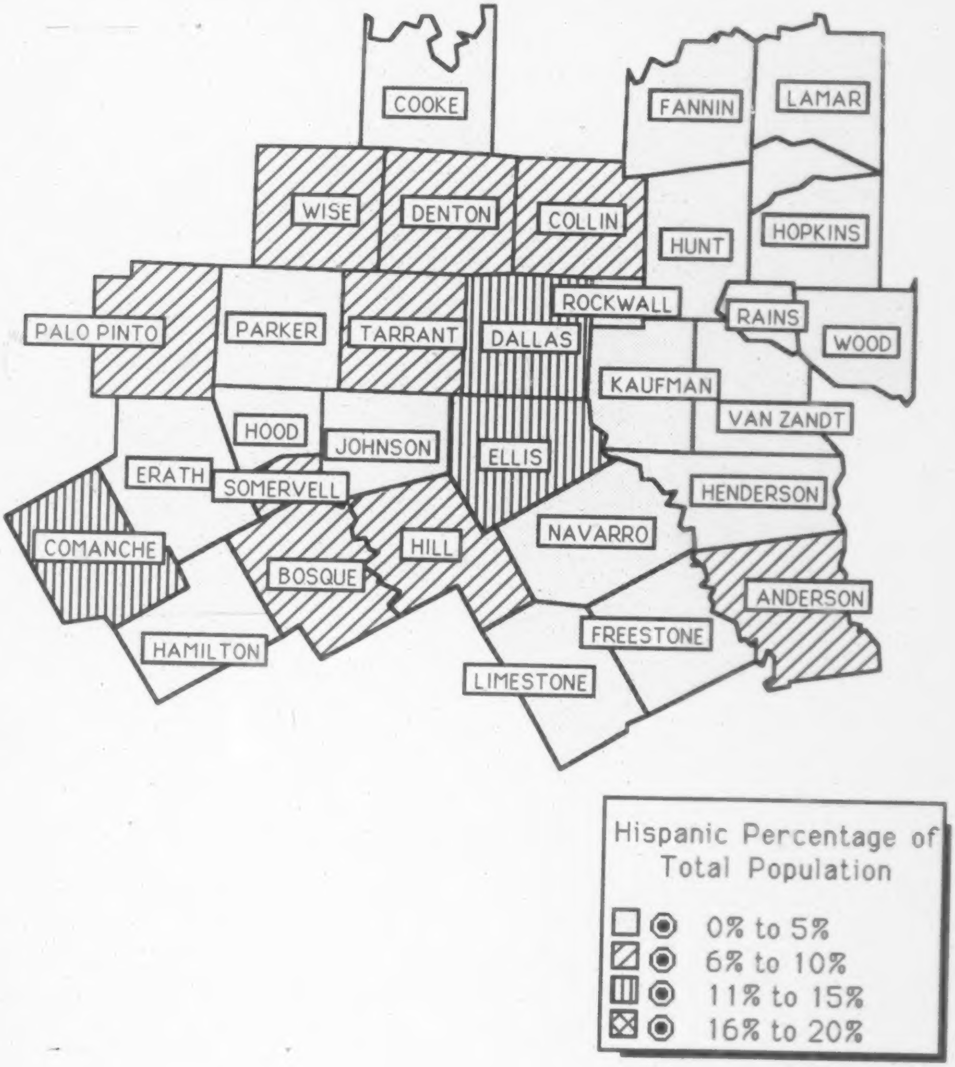
The Dallas/Ft. Worth metropolitan area, which encompasses the counties of Collin, Dallas, Denton, Ellis, Hood, Johnson, Kaufman, Parker, Rockwall, Tarrant, and Wise, contains 499,100 Hispanics, which represents 95% of all Hispanics in the entire market.

**DALLAS/FT. WORTH**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Love | OK | 0.1 | 0.1 | NA | NA |
| Anderson | TX | 1.8 | 2.3 | 3.1 | 2.9 |
| Bosque | TX | 0.7 | 0.8 | 1.1 | 1.1 |
| Collin | TX | 7.2 | 9.5 | 17.4 | 18.7 |
| Comanche | TX | 1.3 | 1.5 | 2.1 | 2.1 |
| Cooke | TX | 0.6 | 0.7 | 0.9 | 0.9 |
| Dallas | TX | 154.6 | 186.8 | 293.3 | 304.7 |
| Delta | TX | * | * | 0.2 | * |
| Denton | TX | 6.4 | 8.6 | 13.6 | 14.7 |
| Ellis | TX | 5.8 | 7.1 | 10.9 | 11.6 |
| Erath | TX | 0.9 | 1.0 | 1.4 | 1.6 |
| Fannin | TX | 0.3 | 0.4 | 0.5 | 0.4 |
| Franklin | TX | * | NA | NA | NA |

Continued...

# Dallas/Ft. Worth ADI


COOKE
FANNIN
LAMAR
WISE
DENTON
COLLIN
HUNT
HOPKINS
PALO PINTO
PARKER
TARRANT
DALLAS
ROCKWALL
RAINS
WOOD
KAUFMAN
VAN ZANDT
HOOD
JOHNSON
ELLIS
ERATH
SOMERVELL
HENDERSON
COMANCHE
HILL
NAVARRO
BOSQUE
ANDERSON
FREESTONE
HAMILTON
LIMESTONE
Hispanic Percentage of Total Population
☐ ◉ 0% to 5%
▨ ◉ 6% to 10%
▥ ◉ 11% to 15%
⊠ ◉ 16% to 20%

## DALLAS/FT. WORTH
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Freestone | TX | 0.3 | 0.4 | 0.6 | 0.6 |
| Grayson | TX | 1.3 | 1.5 | 2.1 | 2.1 |
| Hamilton | TX | 0.2 | 0.2 | 0.2 | 0.2 |
| Henderson | TX | 0.6 | 0.7 | 1.2 | 1.2 |
| Hill | TX | 1.4 | 1.6 | 2.0 | 2.0 |
| Hood | TX | 0.5 | 0.6 | 1.1 | 1.2 |
| Hopkins | TX | 0.4 | 0.5 | 0.6 | 0.8 |
| Hunt | TX | 1.3 | 1.5 | 2.3 | 2.3 |
| Jack | TX | 0.1 | 0.1 | 0.1 | NA |
| Johnson | TX | 2.8 | 3.7 | 5.5 | 6.0 |
| Kaufman | TX | 1.7 | 2.1 | 3.2 | 3.4 |
| Lamar | TX | 0.4 | 0.4 | 0.6 | 0.6 |
| Limestone | TX | 0.7 | 0.9 | 1.1 | 1.2 |
| Navarro | TX | 1.5 | 1.7 | 2.3 | 2.3 |
| Palo Pinto | TX | 1.4 | 1.4 | 2.0 | 1.9 |
| Parker | TX | 1.4 | 1.6 | 2.5 | 2.9 |
| Rains | TX | 0.1 | 0.1 | 0.2 | 0.2 |
| Rockwall | TX | 0.5 | 0.6 | 1.1 | 1.3 |
| San Saba | TX | NA | NA | NA | NA |
| Somervell | TX | 0.3 | 0.4 | 0.6 | 0.6 |
| Stephens | TX | 0.6 | NA | NA | NA |
| Tarrant | TX | 67.6 | 83.0 | 125.0 | 132.0 |
| Van Zandt | TX | 0.6 | 0.7 | 1.0 | 1.0 |
| Wise | TX | 1.3 | 1.8 | 2.6 | 2.6 |
| Wood | TX | NA | 0.3 | 0.5 | 0.6 |
| TOTAL | | 266.7 | 324.6 | 502.9 | 525.7 |

NA = Not Applicable

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

The Dallas/Ft. Worth ADI encompasses a total population of approximately 5.4 million persons. Of this total, approximately one out of every ten persons (10%) is of Hispanic origin/descent.

Hispanics represent 14% of Dallas County's total population base and 10% of Tarrant County's total population base.

Within the Dallas/Ft. Worth area, there are a total of 144,600 Hispanic households. Overall, the average Hispanic household in Dallas County is comprised of 3.6 members.

### DALLAS/FT. WORTH
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Anderson | TX | 2.9 | 0.4 | 5.8% | 50.0 |
| Bosque | TX | 1.1 | 0.3 | 6.8 | 16.2 |
| Collin | TX | 18.7 | 4.6 | 6.3 | 296.3 |
| Comanche | TX | 2.1 | 0.5 | 13.7 | 15.3 |
| Cooke | TX | 0.9 | 0.2 | 2.5 | 36.0 |
| Dallas | TX | 304.7 | 85.8 | 13.5 | 2,256.9 |
| Delta | TX | * | * | 0.5 | 5.2 |
| Denton | TX | 14.7 | 3.9 | 5.7 | 258.4 |
| Ellis | TX | 11.6 | 2.8 | 12.2 | 95.4 |
| Erath | TX | 1.6 | 0.4 | 5.1 | 31.7 |
| Fannin | TX | 0.4 | 0.1 | 1.6 | 25.0 |
| Freestone | TX | 0.6 | 0.1 | 2.4 | 25.0 |
| Grayson | TX | 2.1 | 0.6 | 1.9 | 110.5 |
| Hamilton | TX | 0.2 | 0.1 | 2.5 | 8.0 |
| Henderson | TX | 1.2 | 0.3 | 1.8 | 66.7 |
| Hill | TX | 2.0 | 0.5 | 6.9 | 29.0 |
| Hood | TX | 1.2 | 0.3 | 3.1 | 39.5 |
| Hopkins | TX | 0.8 | 0.3 | 1.8 | 45.3 |
| Hunt | TX | 2.3 | 0.6 | 3.1 | 74.2 |

Continued...

## DALLAS/FT. WORTH
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Johnson | TX | 6.0 | 1.5 | 5.2 | 114.9 |
| Kaufman | TX | 3.4 | 0.8 | 5.4 | 63.0 |
| Lamar | TX | 0.6 | 0.2 | 1.1 | 54.5 |
| Limestone | TX | 1.2 | 0.3 | 4.5 | 27.2 |
| Navarro | TX | 2.3 | 0.6 | 5.1 | 45.1 |
| Palo Pinto | TX | 1.9 | 0.5 | 7.1 | 26.8 |
| Parker | TX | 2.9 | 0.7 | 3.8 | 75.3 |
| Rains | TX | 0.2 | 0.1 | 1.4 | 14.3 |
| Rockwall | TX | 1.3 | 0.3 | 3.9 | 32.6 |
| Somervell | TX | 0.6 | 0.2 | 8.1 | 7.4 |
| Tarrant | TX | 132.0 | 36.5 | 10.0 | 1,319.9 |
| Van Zandt | TX | 1.0 | 0.3 | 2.1 | 47.6 |
| Wise | TX | 2.6 | 0.6 | 6.3 | 41.3 |
| Wood | TX | 0.6 | 0.2 | 1.3 | 46.2 |
| TOTAL | | 525.7 | 144.6 | 9.7% | 5,400.6 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

As is common with many Hispanic markets, the age distribution within the Dallas/Ft. Worth market is skewed towards the younger Hispanic. Specifically, 74% of the Hispanic population is under 35 years of age, and 37% are less than 18 years of age.

The gender distribution among the adult Hispanic population in the Dallas/Ft. Worth is slightly skewed towards a higher proportion of males, who constitute 33% of the total Hispanic population, compared to 30% for females.

### DALLAS/FT. WORTH
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 42.0 | | 8.0% | |
| Males 25-34 | 61.3 | | 11.7 | |
| Males 35-49 | 42.0 | | 8.0 | |
| Males 50-54 | 6.3 | | 1.2 | |
| Males 55-64 | 12.6 | | 2.4 | |
| Males 65+ | 9.0 | | 1.7 | |
| **Males 18+** | | **173.2** | | **32.9%** |
| Females 18-24 | 36.1 | | 6.9 | |
| Females 25-34 | 53.3 | | 10.1 | |
| Females 35-49 | 41.3 | | 7.9 | |
| Females 50-54 | 6.3 | | 1.2 | |
| Females 55-64 | 12.1 | | 2.3 | |
| Females 65+ | 9.0 | | 1.7 | |
| **Females 18+** | | **158.1** | | **30.1** |
| **Teens (12-17)** | 64.6 | **64.6** | 12.3 | **12.3** |
| **Children (0-11)** | | **129.8** | | **24.7** |
| Children (2-11) | 107.6 | | 20.5 | |
| TOTAL 2+ | 503.5 | | 95.8% | |
| **TOTAL** | | **525.7** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

The Dallas/Ft. Worth Hispanic market is chiefly of Mexican origin, as 95% of the Hispanics residing there are descendants of Mexico.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the Dallas/Ft. Worth market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS HISPANIC HOUSEHOLDS 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 23% | 33,258 |
| VCRs | 59% | 85,314 |
| Without Telephone | 48% | 69,408 |
| With Unlisted Telephone | 18% | 26,028 |
| Average Number of TV Sets Per Household | 2.2 | -- |

Source:Strategy Research Corporation

## MARKET 14

# PHOENIX

*MARKET SIZE: 461,400 HISPANIC POPULATION*

### 1. Hispanic Population

The 1991 estimated Hispanic population for the Phoenix ADI currently stands at 461,400 people, up 11% from the 417,200 Hispanics that lived there two years ago, and 45% higher than 1985 Hispanic population figures.

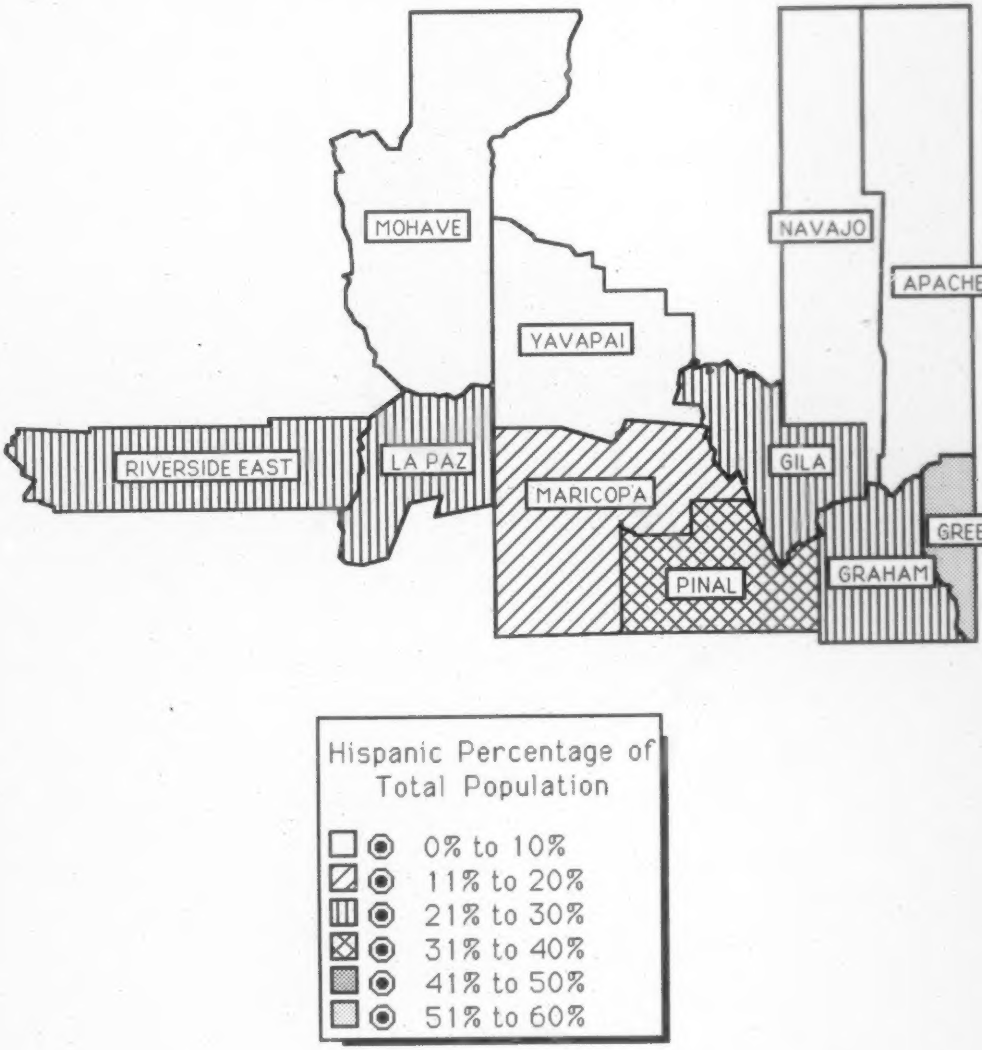
The largest proportion of the market's Hispanics reside in Maricopa County, where 361,000 Hispanics, or 78% of the total Hispanic population base, reside. Pinal County is second largest in terms of number of Hispanic residents, with a Hispanic population comprised of 45,200 people. Of all the counties in the ADI, Pinal County showed the largest percentage increase in its Hispanic population since 1989, jumping 17% in the last two years.

**PHOENIX**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Apache South | AZ | NA | NA | 0.6 | 0.6 |
| Coconino | AZ | NA | 8.0 | NA | NA |
| Gila | AZ | 7.7 | 8.7 | 10.4 | 11.0 |
| Graham | AZ | NA | NA | 7.5 | 7.7 |
| Greenlee | AZ | 5.4 | 6.1 | 6.6 | 6.2 |
| La Paz | AZ | NA | NA | 3.6 | 4.0 |
| Maricopa | AZ | 199.0 | 246.5 | 327.0 | 361.0 |
| Mohave | AZ | 2.3 | 2.9 | 4.2 | 4.8 |

Continued...

# Pheonix ADI


MOHAVE
NAVAJO
APACHE
YAVAPAI
RIVERSIDE EAST
LA PAZ
GILA
MARICOPA
GREENLEE
PINAL
GRAHAM
Hispanic Percentage of Total Population
□ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%
⊠ ◉ 31% to 40%
▩ ◉ 41% to 50%
▦ ◉ 51% to 60%

## PHOENIX
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Navajo | AZ | 4.5 | 5.1 | 6.2 | 6.6 |
| Pinal | AZ | 126.8 | 30.9 | 38.6 | 45.2 |
| Yavapai | AZ | 4.2 | 4.9 | 7.2 | 8.5 |
| Riverside East | CA | 4.9 | 4.5 | 5.3 | 5.8 |
| San Bernardino East | CA | 1.5 | NA | NA | NA |
| TOTAL | | 256.3 | 317.6 | 417.2 | 461.4 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

With a Hispanic population of 461,400 and a total population of 2,847,100, the Phoenix ADI is 16% Hispanic.

Maricopa County, the largest county in terms of absolute number of Hispanic residents, is itself 16% Hispanic. Pinal County, meanwhile, is 34% Hispanic.

There are an estimated 133,700 households headed by Hispanics in the Phoenix ADI, resulting in an average household size of 3.5 members.

### PHOENIX
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Apache South | AZ | 0.6 | 0.2 | 5.0% | 12.0 |
| Gila | AZ | 11.0 | 3.6 | 24.5 | 44.9 |
| Graham | AZ | 7.7 | 2.1 | 28.0 | 27.6 |
| Greenlee | AZ | 6.2 | 2.0 | 53.6 | 11.6 |
| La Paz | AZ | 4.0 | 1.1 | 23.8 | 16.8 |
| Maricopa | AZ | 361.0 | 104.3 | 15.8 | 2,285.1 |
| Mohave | AZ | 4.8 | 1.5 | 5.0 | 96.3 |
| Navajo | AZ | 6.6 | 2.0 | 8.0 | 82.6 |
| Pinal | AZ | 45.2 | 12.7 | 34.0 | 132.9 |
| Yavapai | AZ | 8.5 | 2.7 | 7.6 | 111.4 |
| Riverside East | CA | 5.8 | 1.5 | 22.4 | 25.9 |
| TOTAL | | 461.4 | 133.7 | 16.2% | 2,847.1 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Consistent with national patterns, the Hispanic residents of Phoenix are younger than their non-Hispanic couterparts. Almost 74% of these Hispanics are under 35 years of age, whereas 43% are under 18 years of age.

Adults over the age of 49 make up only 12% of the Hispanic population.

There are approximately the same percentage of Hispanic males as there are females in the Phoenix market.

### PHOENIX
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 30.1 | | 6.5% | |
| Males 25-34 | 43.8 | | 9.5 | |
| Males 35-49 | 30.5 | | 6.6 | |
| Males 50-54 | 6.3 | | 1.4 | |
| Males 55-64 | 12.7 | | 2.8 | |
| Males 65+ | 7.5 | | 1.6 | |
| **Males 18+** | | **130.9** | | **28.4%** |
| Females 18-24 | 28.2 | | 6.1 | |
| Females 25-34 | 41.0 | | 8.9 | |
| Females 35-49 | 32.3 | | 7.0 | |
| Females 50-54 | 6.5 | | 1.4 | |
| Females 55-64 | 13.6 | | 2.9 | |
| Females 65+ | 9.2 | | 2.0 | |
| **Females 18+** | | **130.8** | | **28.3** |
| **Teens (12-17)** | 61.4 | **61.4** | 13.3 | **13.3** |
| **Children (0-11)** | | **138.3** | | **30.0** |
| Children (2-11) | 115.5 | | 25.0 | |
| TOTAL 2+ | 438.6 | | 95.0% | |
| **TOTAL** | | **461.4** | | **100.0%** |

Source: Strategy Research Corporation

## 4. Country Of Origin

Phoenix is yet another community where the Mexican population dominates the overall Hispanic population. Approximately 93% of the Phoenix Hispanic market is of Mexican origin/descent.

## 5. Other Ownership Characteristics

The following are additional Hispanic household information for the Phoenix market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS
### HISPANIC HOUSEHOLDS
### 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 36% | 48,132 |
| VCRs | 59% | 78,883 |
| Without Telephone | 42% | 56,154 |
| With Unlisted Telephone | 39% | 52,143 |
| Average Number of TV Sets Per Household | 1.8 | -- |

Source:Strategy Research Corporation

# SACRAMENTO

*MARKET SIZE: 439,900 HISPANIC POPULATION*

## 1. Hispanic Population

The Sacramento ADI is currently comprised of sixteen counties and contains 439,900 Hispanics, a 68% increase from 1980.

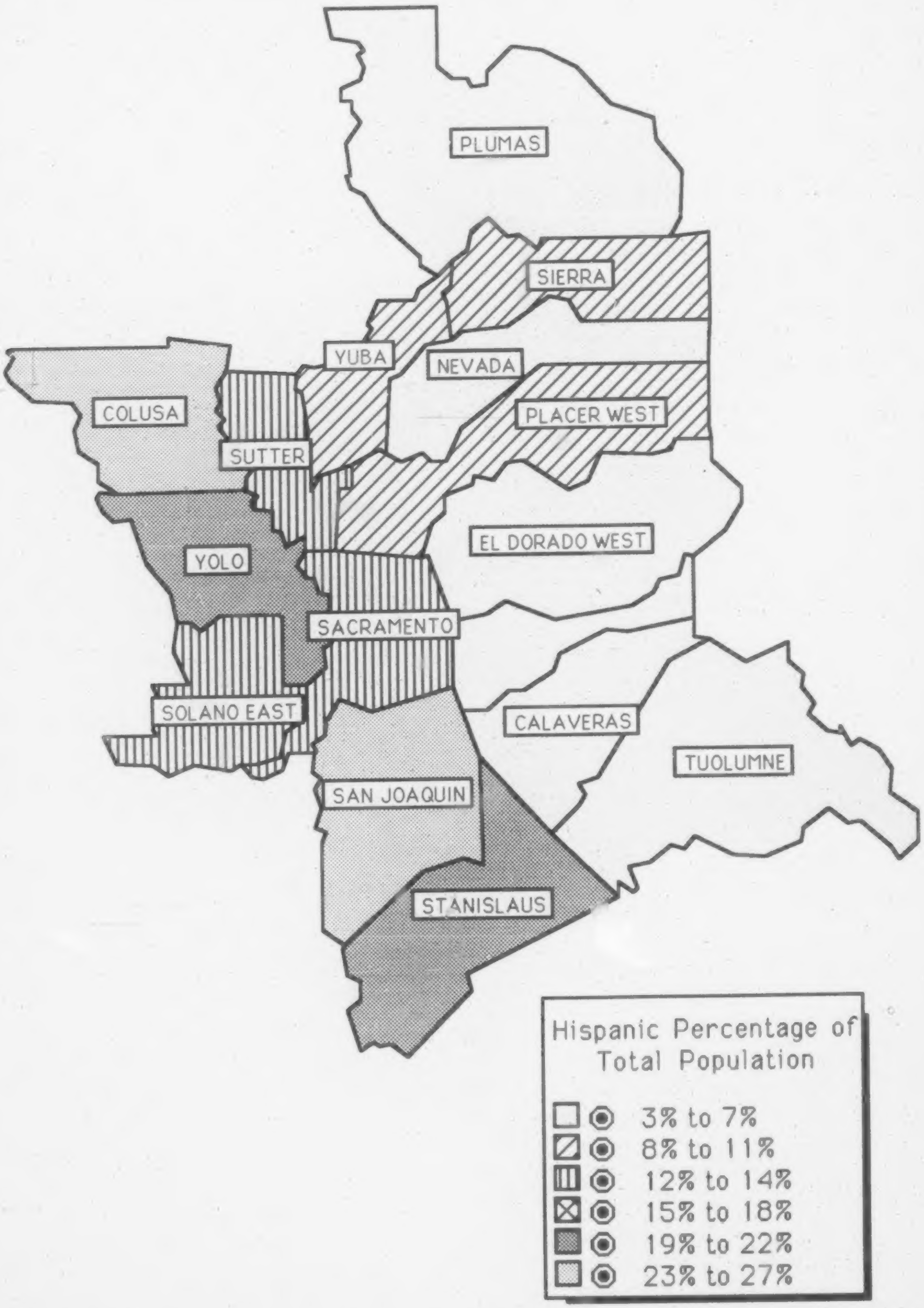
Sacramento County contains the most Hispanics, as 30% of the market's Hispanic population resides there. The second-most heavily populated Hispanic county is San Joaquin, with 122,300 Hispanics, or 28% of the ADI's total. Combined, these two counties account for well over one-half (58%) of the Sacramento market's Hispanic population.

### SACRAMENTO HISPANIC POPULATION 1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Amador | CA | 0.9 | 1.0 | 1.7 | 1.8 |
| Calaveras | CA | 0.9 | 1.2 | 1.7 | 1.9 |
| Colusa | CA | 2.5 | 3.0 | 3.9 | 3.9 |
| Contra Costa East | CA | 5.1 | 4.7 | NA | NA |
| El Dorado West | CA | 4.0 | 2.9 | 5.6 | 5.9 |
| Mono | CA | 0.4 | NA | 0.6 | NA |
| Nevada | CA | 1.5 | 2.2 | 2.8 | 3.2 |
| Placer West | CA | 8.2 | 8.6 | 14.7 | 15.3 |
| Plumas | CA | 0.6 | 0.8 | 1.0 | 1.2 |
| Sacramento | CA | 74.1 | 92.6 | 121.3 | 132.5 |
| San Joaquin | CA | 66.6 | 82.7 | 112.7 | 122.3 |
| Sierra | CA | 0.2 | 0.2 | 0.4 | 0.4 |

Continued...

# Sacramento ADI


PLUMAS
SIERRA
YUBA
NEVADA
COLUSA
PLACER WEST
SUTTER
EL DORADO WEST
YOLO
SACRAMENTO
SOLANO EAST
CALAVERAS
TUOLUMNE
SAN JOAQUIN
STANISLAUS
Hispanic Percentage of Total Population
☐ ◉ 3% to 7%
▨ ◉ 8% to 11%
▥ ◉ 12% to 14%
☒ ◉ 15% to 18%
■ ◉ 19% to 22%
▩ ◉ 23% to 27%

## SACRAMENTO
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Solano East | CA | 24.8 | 18.2 | 26.1 | 27.0 |
| Stanislaus | CA | 40.0 | 50.7 | 66.0 | 73.3 |
| Sutter | CA | 6.1 | 7.6 | 8.9 | 9.3 |
| Toulumne | CA | 1.8 | 2.2 | 3.1 | 3.3 |
| Yolo | CA | 19.3 | 23.4 | 29.4 | 32.1 |
| Yuba | CA | 4.4 | 5.3 | 6.3 | 6.5 |
| TOTAL | | 261.4 | 307.3 | 406.2 | 439.9 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

With a total population of 3.1 million and a Hispanic population of 439,900, the Sacramento ADI is 14% Hispanic in composition.

Of the 124,700 Hispanic households in the Sacramento market, 75% are located within three counties; Sacramento, San Joaquin, and Stanislaus. These three counties together account for 93,000 Hispanic households.

An average of 3.5 people live in each of the 124,700 Hispanic households contained within the Sacramento ADI.

### SACRAMENTO
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Amador | CA | 1.8 | 0.5 | 5.8% | 30.8 |
| Calaveras | CA | 1.9 | 0.5 | 5.5 | 34.4 |
| Colusa | CA | 3.9 | 1.0 | 24.0 | 16.3 |
| El Dorado West | CA | 5.9 | 1.7 | 5.7 | 103.8 |
| Mono | CA | NA | NA | NA | NA |
| Nevada | CA | 3.2 | 0.9 | 3.6 | 87.5 |
| Placer West | CA | 15.3 | 4.8 | 8.5 | 180.0 |
| Plumas | CA | 1.2 | 0.3 | 4.6 | 26.3 |
| Sacramento | CA | 132.5 | 41.4 | 11.8 | 1,122.9 |
| San Joaquin | CA | 122.3 | 32.8 | 23.6 | 518.1 |
| Sierra | CA | 0.4 | 0.1 | 8.7 | 4.6 |
| Solano East | CA | 27.0 | 7.6 | 12.9 | 209.3 |
| Stanislaus | CA | 73.3 | 18.8 | 18.5 | 396.4 |
| Sutter | CA | 9.3 | 2.5 | 14.2 | 65.5 |
| Toulumne | CA | 3.3 | 0.9 | 6.6 | 50.0 |
| Yolo | CA | 32.1 | 9.1 | 20.8 | 154.1 |
| Yuba | CA | 6.5 | 1.8 | 10.7 | 60.8 |
| TOTAL | | 439.9 | 124.7 | 14.4% | 3,060.8 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The Sacramento ADI contains a young Hispanic population -- 39% of the market is under 18 years of age, and 70% are under 35 years.

Adult males constitute a slightly higher proportion of the Hispanic population at 32%, as compared with 29% for adult females.

### SACRAMENTO
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 29.9 | | 6.8% | |
| Males 25-34 | 43.8 | | 9.9 | |
| Males 35-49 | 36.5 | | 8.3 | |
| Males 50-54 | 7.1 | | 1.6 | |
| Males 55-64 | 14.0 | | 3.2 | |
| Males 65+ | 10.1 | | 2.3 | |
| **Males 18+** | | **141.4** | | **32.1%** |
| Females 18-24 | 26.8 | | 6.1 | |
| Females 25-34 | 39.5 | | 9.0 | |
| Females 35-49 | 34.3 | | 7.8 | |
| Females 50-54 | 6.1 | | 1.4 | |
| Females 55-64 | 12.3 | | 2.8 | |
| Females 65+ | 9.7 | | 2.2 | |
| **Females 18+** | | **128.7** | | **29.3** |
| **Teens (12-17)** | 56.6 | **56.6** | 12.9 | **12.9** |
| **Children (0-11)** | | **113.2** | | **25.7** |
| Children (2-11) | 94.0 | | 21.3 | |
| TOTAL 2+ | 420.7 | | 95.6% | |
| **TOTAL** | | **439.9** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 16

# CORPUS CHRISTI

*MARKET SIZE: 403,800 HISPANIC POPULATION*

### 1. Hispanic Population

The Corpus Christi market, located on the southeastern coast of Texas, consists of 12 counties and ranks as the sixteenth largest Hispanic populated ADI in the United States. With an estimated Hispanic population of nearly 404,000, this market represents 1.6% of the total U.S. Hispanic population.

The largest county in the ADI, Nueces, contains 55% of its Hispanics (nearly 224,000). The largest three counties in this market, Nueces, San Patricio, and Jim Wells, represent 76% of the market's Hispanic population. The Hispanic population of these three counties experienced growth of between 60%-71% between 1980 and 1991.

Overall, the Corpus Christi ADI increased its Hispanic population by approximately 67% between 1980 and 1991. Nueces County's Hispanic population gain during the past eleven years totalled 92,500, representing 56% of the ADI's total Hispanic gain during this period.

## 4. Country Of Origin

96% of all Hispanics residing in the Sacramento ADI are of Mexican origin or descent.

## 5. Other Ownership Characteristics

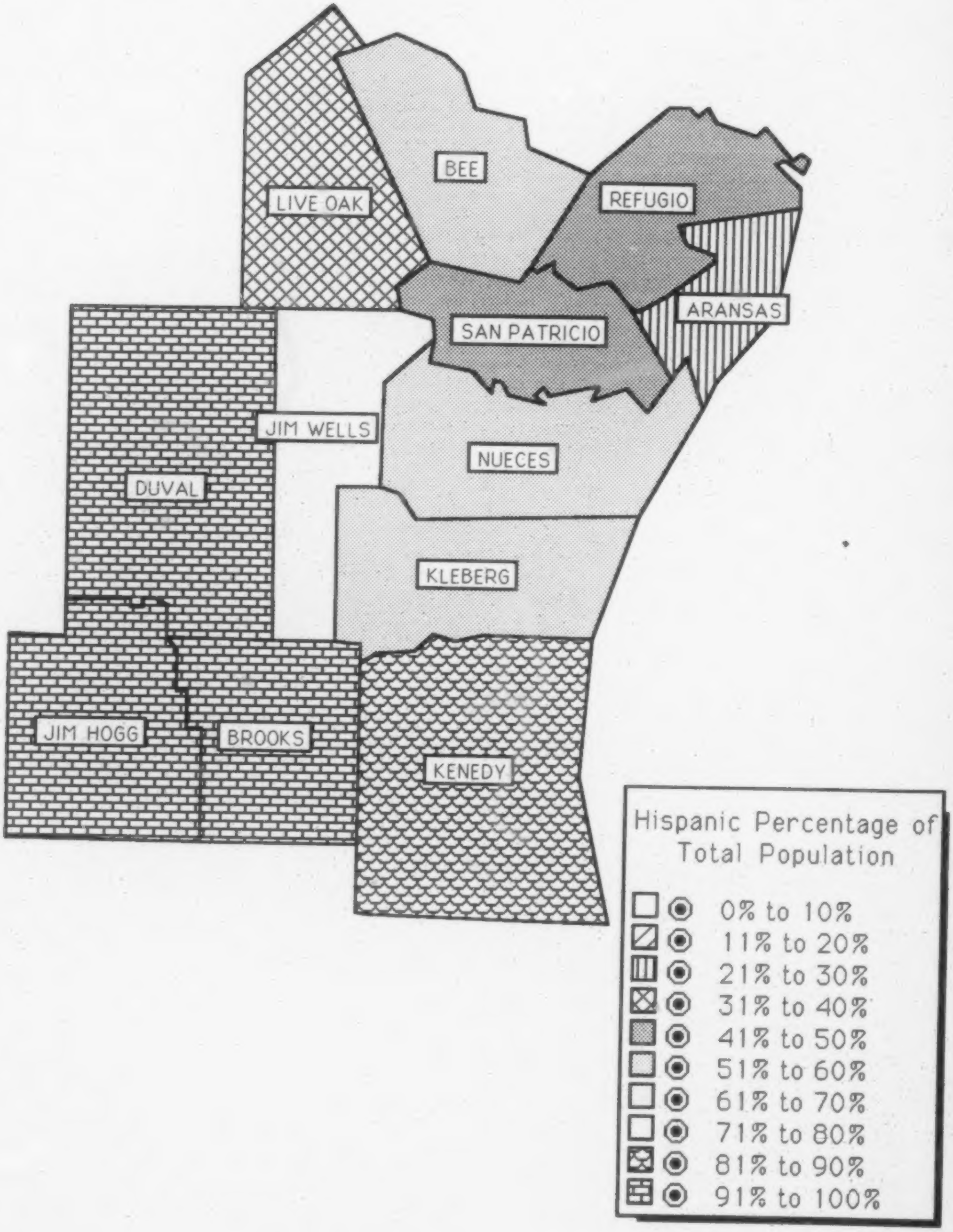
The following are additional Hispanic household information for the Scaramento market on **Cable Television Subscription, Incidence of VCR Ownership, Telephone Ownership Status** and **Average Number of TV Sets Per Household.**

### OTHER OWNERSHIP CHARACTERISTICS
### HISPANIC HOUSEHOLDS
### 1991

| Ownership Status of | Percentage of Hispanic Households | Number of Hispanic Households |
|---|---|---|
| Cable Television | 51% | 63,597 |
| VCRs | 62% | 77,314 |
| Without Telephone | 38% | 47,386 |
| With Unlisted Telephone | 38% | 47,386 |
| Average Number of TV Sets Per Household | 2.3 | -- |

Source:Strategy Research Corporation

# Corpus Christi ADI


LIVE OAK
BEE
REFUGIO
ARANSAS
SAN PATRICIO
JIM WELLS
NUECES
DUVAL
KLEBERG
JIM HOGG
BROOKS
KENEDY
Hispanic Percentage of Total Population
0% to 10%
11% to 20%
21% to 30%
31% to 40%
41% to 50%
51% to 60%
61% to 70%
71% to 80%
81% to 90%
91% to 100%

## CORPUS CHRISTI
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Aransas | TX | 2.7 | 3.4 | 4.9 | 5.3 |
| Bee | TX | 11.9 | 14.0 | 19.0 | 20.6 |
| Brooks | TX | 7.2 | 7.7 | 10.5 | 10.7 |
| Duval | TX | 10.7 | 11.7 | 16.2 | 16.8 |
| Jim Hogg | TX | 4.7 | 5.0 | 5.8 | 6.0 |
| Jim Wells | TX | 24.5 | 29.0 | 39.2 | 39.1 |
| Kenedy | TX | 0.5 | 0.5 | 0.6 | 0.6 |
| Kleberg | TX | 17.4 | 20.0 | 25.6 | 27.3 |
| Live Oak | TX | NA | NA | 4.6 | 4.8 |
| Nueces | TX | 131.3 | 155.8 | 219.4 | 223.8 |
| Refugio | TX | 3.6 | 3.9 | 5.0 | 5.2 |
| San Patricio | TX | 26.9 | 32.1 | 43.8 | 43.6 |
| TOTAL | | 241.4 | 283.1 | 394.6 | 403.8 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

The Corpus Christi ADI is inhabited by a total population of 728,200 persons. The three largest counties in terms of total population (Nueces, San Patricio, and Jim Wells), represent 76% or an estimated 555,600 of this total.

Hispanics currently represent approximately 56% of the market's total population (403,800). The number of Hispanics range from a high of 223,800 in Nueces County, to a low of 600 in Kenedy County.

There are approximately 113,400 Hispanic households in this Texas ADI, with 62,300 (or 55%) located in Nueces County. The average number of Hispanics per household is 3.6.

### CORPUS CHRISTI
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Aransas | TX | 5.3 | 1.5 | 22.4% | 23.7 |
| Bee | TX | 20.6 | 5.8 | 52.0 | 39.6 |
| Brooks | TX | 10.7 | 3.2 | 92.3 | 11.6 |
| Duval | TX | 16.8 | 5.0 | 91.0 | 18.5 |
| Jim Hogg | TX | 6.0 | 2.0 | 95.2 | 6.3 |
| Jim Wells | TX | 39.1 | 11.3 | 73.3 | 53.3 |
| Kenedy | TX | 0.6 | 0.2 | 83.0 | 0.7 |
| Kleberg | TX | 27.3 | 7.9 | 58.0 | 47.1 |
| Live Oak | TX | 4.8 | 1.3 | 37.0 | 13.0 |
| Nueces | TX | 223.8 | 62.3 | 54.1 | 413.7 |
| Refugio | TX | 5.2 | 1.5 | 43.1 | 12.1 |
| San Patricio | TX | 43.6 | 11.4 | 49.2 | 88.6 |
| TOTAL | | 403.8 | 113.4 | 55.5% | 728.2 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The Corpus Christi market consists of slightly more Hispanic females eighteen years of age and older than males (31% versus 29%, respectively). Hispanic males and females between the ages of 18-34 years represent 29% of the population for the Corpus Christi Hispanic market, as compared to their older counterparts aged 50 years or more, who comprise 16%.

**CORPUS CHRISTI**
**HISPANIC AGE/SEX DISTRIBUTION**
**1991**

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 24.0 | | 5.9% | |
| Males 25-34 | 34.7 | | 8.6 | |
| Males 35-49 | 26.2 | | 6.5 | |
| Males 50-54 | 6.8 | | 1.7 | |
| Males 55-64 | 13.3 | | 3.3 | |
| Males 65+ | 10.1 | | 2.5 | |
| **Males 18+** | | **115.1** | | **28.5%** |
| Females 18-24 | 24.1 | | 6.0 | |
| Females 25-34 | 34.3 | | 8.5 | |
| Females 35-49 | 32.1 | | 7.9 | |
| Females 50-54 | 7.6 | | 1.9 | |
| Females 55-64 | 15.1 | | 3.7 | |
| Females 65+ | 11.9 | | 2.9 | |
| **Females 18+** | | **125.1** | | **31.0** |
| **Teens (12-17)** | 54.5 | **54.5** | 13.5 | **13.5** |
| **Children (0-11)** | | **109.1** | | **27.0** |
| Children (2-11) | 92.0 | | 22.8 | |
| TOTAL 2+ | 386.7 | | 95.8% | |
| **TOTAL** | | **386.7** | | **100.0%** |

Source: Strategy Research Corporation

**MARKET 17**

# DENVER

*MARKET SIZE: 312,200 HISPANIC POPULATION*

## 1. Hispanic Population

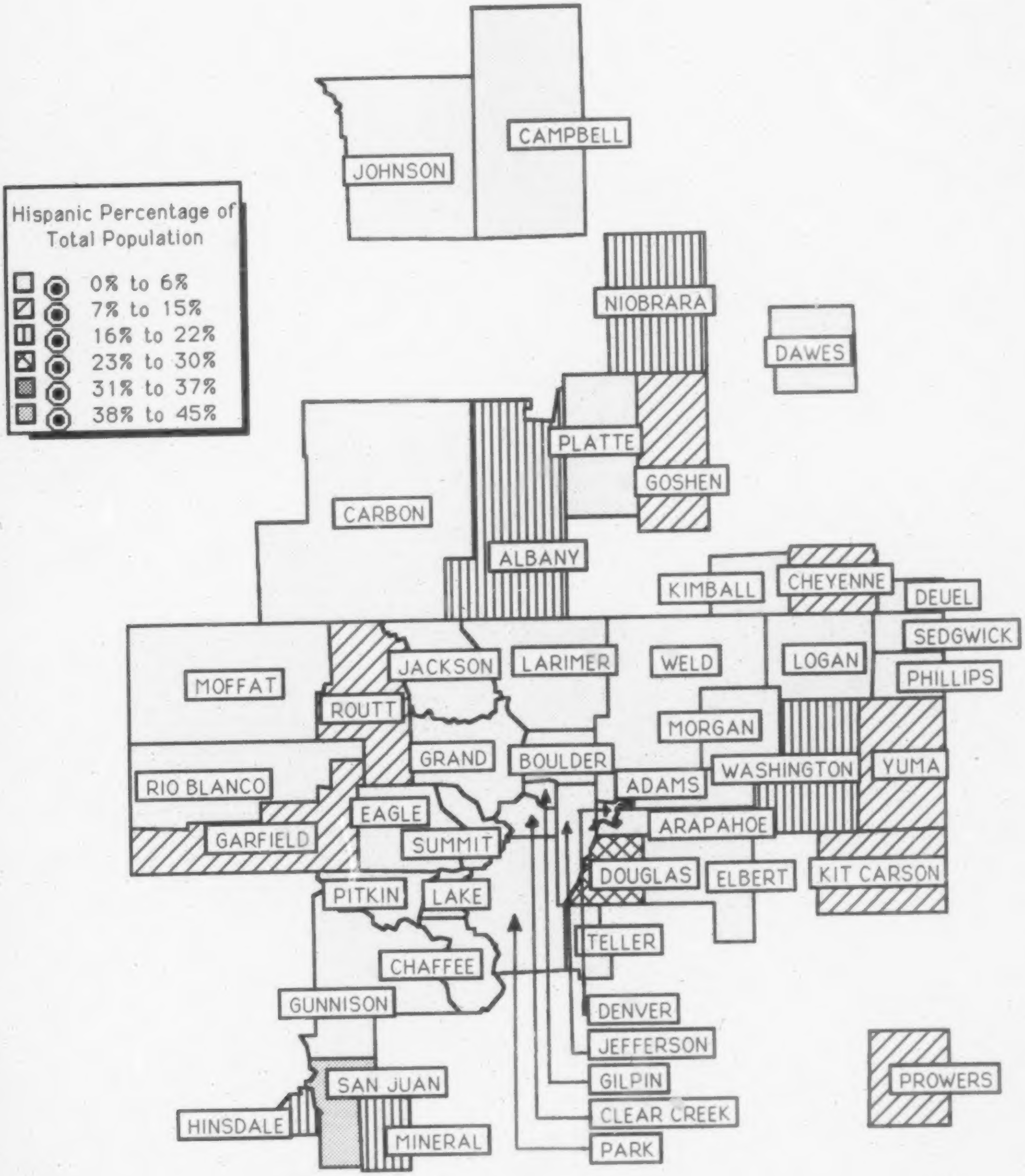
Based on the 1991 population estimate of the U.S. Hispanic populaton, the Denver ADI is the seventeenth largest Hispanic market in the United States. This ADI encompasses parts of the states of Colorado, Nebraska, and Wyoming. The estimated 312,000 Hispanics of this market represent a little more than 1% of the total U.S. Hispanic population.

The county representing the largest share of Hispanics in this market is Denver County with 36% of its total or 113,100 persons. The top five counties (Denver, Adams, Arapahoe, Jefferson, and Weld) in the ADI represent 80% of the market's Hispanics, for a total of 250,900. Arapahoe and Jefferson and Adams Counties experienced the largest percentage increase between 1985 and 1991 (approximately 25% to 45%).

Between 1980 and 1991, the largest percentage growth occurred in Arapahoe County which experienced an increase in Hispanic population of 80% for the period (increasing from 12,500 in 1980 to 22,500 in 1991). Hispanic population growth among the other major counties in the ADI ranged from 23% for Denver County to 57% for Jefferson County. The overall percentage growth increase for the ADI was 41% between 1980 and 1991.

Jefferson County experienced the largest numerical gain of Hispanics in the ADI between 1980 and 1991, increasing by 27,600. This represented 30% of the ADI's total increase of Hispanic population during the eleven year period. Denver County's Hispanic estimated population of 1991 represented an increase of 21,100 and Adams County gained 16,400 Hispanics during the eleven years.

# Denver ADI


Hispanic Percentage of Total Population
0% to 6%
7% to 15%
16% to 22%
23% to 30%
31% to 37%
38% to 45%
CAMPBELL
JOHNSON
NIOBRARA
DAWES
PLATTE
GOSHEN
CARBON
ALBANY
KIMBALL
CHEYENNE
DEUEL
SEDGWICK
MOFFAT
JACKSON
LARIMER
WELD
LOGAN
PHILLIPS
ROUTT
MORGAN
GRAND
BOULDER
WASHINGTON
YUMA
RIO BLANCO
ADAMS
EAGLE
ARAPAHOE
GARFIELD
SUMMIT
DOUGLAS
ELBERT
KIT CARSON
PITKIN
LAKE
TELLER
CHAFFEE
GUNNISON
DENVER
JEFFERSON
GILPIN
SAN JUAN
PROWERS
CLEAR CREEK
HINSDALE
MINERAL
PARK

# DENVER
# HISPANIC POPULATION
## 1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Adams | CO | 38.5 | 44.0 | 50.4 | 54.9 |
| Alamoso | CO | NA | 4.0 | NA | NA |
| Arapahoe | CO | 12.5 | 15.5 | 20.4 | 22.5 |
| Boulder | CO | 10.3 | 11.9 | 13.8 | 15.1 |
| Chaffee | CO | 1.3 | 1.3 | 1.5 | 1.7 |
| Clear Creek | CO | 0.3 | 0.3 | 0.4 | 0.4 |
| Denver | CO | 92.0 | 95.8 | 109.9 | 113.1 |
| Douglas | CO | 0.6 | 0.8 | 1.3 | 1.3 |
| Eagle | CO | 0.8 | 1.0 | 1.2 | 1.2 |
| Elbert | CO | 0.1 | 0.2 | 0.2 | 0.2 |
| Garfield | CO | 0.9 | 1.1 | 1.3 | 1.5 |
| Gilpin | CO | * | 0.1 | 0.1 | 0.1 |
| Grand | CO | 0.3 | 0.3 | 0.4 | 0.4 |
| Gunnison | CO | 0.3 | 0.4 | 0.5 | 0.5 |
| Hinsdale | CO | NA | * | * | * |
| Jackson | CO | * | 0.1 | 0.1 | 0.1 |
| Jefferson | CO | 19.5 | 23.8 | 27.9 | 30.7 |
| Kit Carson | CO | 0.4 | 0.4 | 0.5 | 0.5 |
| Lake | CO | 2.1 | 2.3 | 2.6 | 2.7 |
| Larimer | CO | 8.8 | 10.0 | 12.5 | 13.8 |
| Lincoln | CO | NA | 0.1 | 0.1 | NA |
| Logan | CO | NA | 1.4 | NA | 1.3 |
| Moffat | CO | 0.7 | 0.8 | 0.9 | 0.9 |
| Morgan | CO | 2.7 | 2.9 | 3.4 | 3.7 |
| Park | CO | 0.1 | 0.2 | 0.3 | 0.3 |
| Phillips | CO | 0.1 | 0.1 | 0.2 | 0.2 |
| Pitkin | CO | 0.1 | 0.2 | 0.2 | 0.2 |
| Prowers | CO | NA | 2.7 | 3.0 | 3.3 |
| Rio Blanco | CO | 0.2 | 0.2 | 0.3 | 0.3 |
| Routt | CO | 0.4 | 0.4 | 0.5 | 0.5 |
| Sedgwick | CO | NA | 0.3 | 0.4 | 0.4 |
| Summit | CO | 0.2 | 0.2 | 0.2 | 0.2 |

Continued. . .

# DENVER
# HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Teller | CO | NA | 0.2 | 0.2 | 0.2 |
| Washington | CO | * | 0.1 | 0.1 | 0.1 |
| Weld | CO | 21.0 | 23.8 | 27.4 | 29.7 |
| Yuma | CO | 0.2 | 0.3 | 0.4 | 0.4 |
| Box Butte | NE | NA | NA | 0.7 | NA |
| Cheyenne | NE | 0.2 | 0.3 | 0.3 | 0.3 |
| Dawes | NE | 0.2 | 0.2 | 0.3 | 0.3 |
| Deuel | NE | NA | NA | 0.1 | 0.1 |
| Keith | NE | 0.4 | 0.4 | NA | NA |
| Kimball | NE | 0.2 | 0.2 | 0.2 | 0.2 |
| Albany | WY | 1.9 | 2.0 | 2.4 | 2.6 |
| Campbell | WY | 0.6 | NA | 1.0 | 1.0 |
| Carbon | WY | 2.5 | 2.7 | 2.9 | 3.0 |
| Goshen | WY | NA | NA | 1.1 | 1.1 |
| Johnson | WY | * | NA | NA | 0.1 |
| Niobrara | WY | NA | * | * | NA |
| San Juan | CO | NA | NA | NA | 0.1 |
| Johnson | WY | NA | NA | NA | 0.1 |
| Logan | CO | NA | NA | NA | 1.3 |
| Platte | WY | 0.6 | 0.7 | 0.8 | 0.8 |
| TOTAL | | 221.0 | 253.7 | 292.4 | 312.2 |

NA = Not Applicable

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Censu
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

A total of approximately 3.1 million persons reside in the Denver ADI. The three largest counties in terms of total population (Denver, Jefferson, and Arapahoe) represent 52%, or 1.6 million persons. Denver County contains 20% or 577,100 of the market's total population. Hispanics represent 10% of the total population in the Denver ADI for 97,400 households, with an average household size of 3.2.

### DENVER
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Adams | CO | 54.9 | 16.6 | 17.0% | 323.0 |
| Arapahoe | CO | 22.5 | 7.1 | 4.5 | 499.2 |
| Boulder | CO | 15.1 | 4.8 | 5.7 | 264.6 |
| Chaffee | CO | 1.7 | 0.5 | 9.5 | 17.5 |
| Clear Creek | CO | 0.4 | 0.1 | 3.7 | 10.9 |
| Denver | CO | 113.1 | 37.5 | 19.6 | 577.1 |
| Douglas | CO | 1.3 | 0.3 | 2.6 | 50.5 |
| Eagle | CO | 1.2 | 0.4 | 6.7 | 18.1 |
| Elbert | CO | 0.2 | * | 2.3 | 8.8 |
| Garfield | CO | 1.5 | 0.4 | 4.5 | 32.4 |
| Gilpin | CO | 0.1 | * | 3.4 | 3.0 |

Continued. . .

## DENVER
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991

(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Grand | CO | 0.4 | 0.1 | 3.7 | 10.9 |
| Gunnison | CO | 0.5 | 0.2 | 3.4 | 14.9 |
| Hinsdale | CO | * | * | * | 0.5 |
| Jackson | CO | 0.1 | * | 2.9 | 3.5 |
| Jefferson | CO | 30.7 | 9.0 | 5.6 | 547.9 |
| Kit Carson | CO | 0.5 | 0.1 | 5.0 | 10.4 |
| Lake | CO | 2.7 | 0.8 | 25.0 | 10.8 |
| Larimer | CO | 13.8 | 4.2 | 6.3 | 219.6 |
| Lincoln | CO | * | * | * | * |
| Moffat | CO | 0.9 | 0.3 | 5.2 | 17.3 |
| Morgan | CO | 3.7 | 1.0 | 12.3 | 30.4 |
| Park | CO | 0.3 | 0.1 | 2.7 | 11.1 |
| Phillips | CO | 0.2 | * | 3.5 | 5.7 |
| Pitkin | CO | 0.2 | 0.1 | 1.4 | 14.3 |
| Prowers | CO | 3.3 | 0.9 | 42.1 | 7.9 |
| Rio Blanco | CO | 0.3 | 0.1 | 3.2 | 9.4 |
| Routt | CO | 0.5 | 0.1 | 2.9 | 17.2 |
| Sedgwick | CO | 0.4 | 0.1 | 10.5 | 3.8 |
| Summit | CO | 0.2 | 0.1 | 1.9 | 10.5 |

Continued . . .

## DENVER
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Teller | CO | 0.2 | 0.1 | 1.6% | 12.5 |
| Washington | CO | 0.1 | * | 1.7 | 5.9 |
| Weld | CO | 29.7 | 8.4 | 18.1 | 164.3 |
| Yuma | CO | 0.4 | 0.1 | 2.7 | 14.8 |
| Box Butte | NE | NA | NA | NA | NA |
| Cheyenne | NE | 0.3 | 0.1 | 2.8 | 10.7 |
| Dawes | NE | 0.3 | 0.1 | 1.9 | 15.8 |
| Deuel | NE | 0.1 | * | 5.0 | 2.0 |
| Kimball | NE | 0.2 | 0.1 | 3.4 | 5.9 |
| Albany | WY | 2.6 | 0.9 | 13.8 | 18.8 |
| Campbell | WY | 1.0 | 0.3 | 2.7 | 37.0 |
| Carbon | WY | 3.0 | 0.9 | 12.2 | 24.6 |
| Goshen | WY | 1.1 | 0.3 | 16.9 | 6.5 |
| Niobrara | WY | * | * | * | 2.9 |
| Mineral | CO | * | * | 5.3 | 0.8 |
| San Juan | CO | 0.1 | * | 15.6 | 0.9 |
| Johnson | WY | 0.1 | * | 1.5 | 6.4 |
| Logan | CO | 1.3 | 0.4 | 7.0 | 18.6 |
| Platte | WY | 0.8 | 0.3 | 5.1 | 15.7 |
| TOTAL | | 312.2 | 97.4 | 10.0% | 3,115.3 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Denver ADI Hispanics are younger demographically following a national trend as compared to non-Hispanics. Female and male Hispanics eighteen years and older in the Denver market area represent approximately the same percentage (31% versus 30% respectively). Male and female Hispanics aged 18-34 years comprise 35% of the market. In comparison, 11% fall into the 50 years or older category.

**DENVER**
**HISPANIC AGE/SEX DISTRIBUTION**
**1991**

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 22.1 | | 7.1% | |
| Males 25-34 | 32.2 | | 10.3 | |
| Males 35-49 | 24.4 | | 7.8 | |
| Males 50-54 | 3.8 | | 1.2 | |
| Males 55-64 | 7.2 | | 2.3 | |
| Males 65+ | 5.3 | | 1.7 | |
| **Males 18+** | | **95.0** | | **30.4%** |
| Females 18-24 | 22.4 | | 7.2 | |
| Females 25-34 | 32.5 | | 10.4 | |
| Females 35-49 | 25.0 | | 8.0 | |
| Females 50-54 | 4.1 | | 1.3 | |
| Females 55-64 | 8.1 | | 2.6 | |
| Females 65+ | 5.9 | | 1.9 | |
| **Females 18+** | | **98.0** | | **31.4** |
| **Teens (12-17)** | 39.0 | **39.0** | 12.5 | **12.5** |
| **Children (0-11)** | | **80.2** | | **25.7** |
| Children (2-11) | 66.7 | | 21.4 | |
| TOTAL 2+ | 298.7 | | 95.7% | |
| **TOTAL** | | **312.2** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 18

# TUCSON

*MARKET SIZE: 268,500 HISPANIC POPULATION*

### 1. Hispanic Population

The Tucson ADI spans an area of five counties in Arizona and two in New Mexico. Since the printing of the last "Blue Book" in 1989, the Tucson ADI has moved up one notch and swapped places with the Philadelphia ADI in terms of total Hispanic population. Now the eighteenth largest Hispanic market in the United States, the Tucson ADI is home to an estimated 268,500 Hispanics.

The vast majority (75%, or an estimated 201,600) of Hispanics in the Tucson market reside in Pima County. Pima County experienced an impressive 81% increase in Hispanic population since 1980 while the Tucson ADI as a whole has grown by 75% since 1980

The Tucson ADI represents just over 1% of the total U.S. Hispanic population.

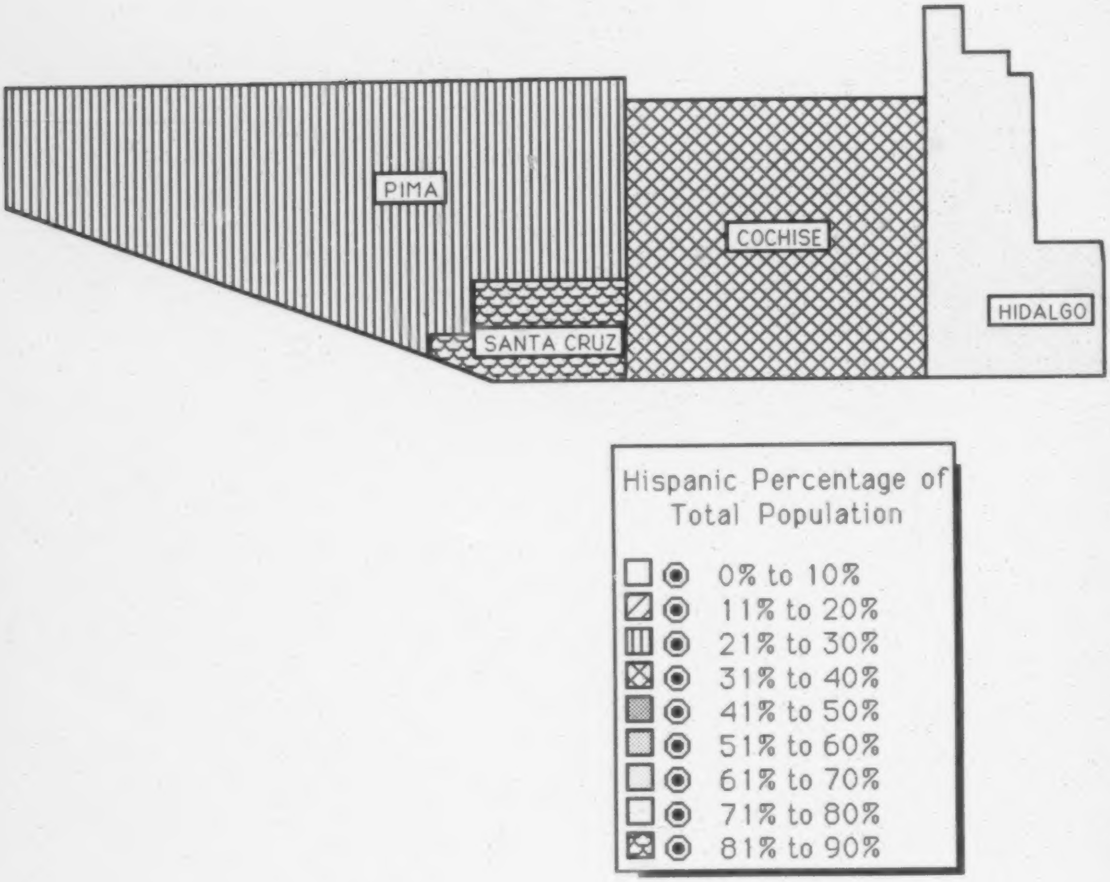
**TUCSON**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Apache South | AZ | 0.6 | 0.4 | NA | NA |
| Cochise | AZ | 22.9 | 25.6 | 34.1 | 36.4 |
| Pima | AZ | 111.4 | 138.1 | 182.8 | 201.6 |
| Graham | AZ | NA | 6.3 | NA | NA |
| Santa Cruz | AZ | 15.2 | 18.3 | 25.0 | 27.0 |
| Catron | NM | 0.8 | NA | NA | NA |
| Hidalgo | NM | 2.8 | 3.0 | NA | 3.5 |
| TOTAL | | 153.7 | 191.7 | 241.9 | 268.5 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Tuscon ADI


PIMA
COCHISE
SANTA CRUZ
HIDALGO
Hispanic Percentage of Total Population
☐ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%
☒ ◉ 31% to 40%
▩ ◉ 41% to 50%
▩ ◉ 51% to 60%
☐ ◉ 61% to 70%
☐ ◉ 71% to 80%
▩ ◉ 81% to 90%

## 2. Hispanic Population/Households - Total Population

Total population for the Tucson ADI is nearly one million persons. Hispanics represent 28% of this total and occupy 81,400 households. The average number of persons in each Hispanic household is 3.3.

Pima County has an estimated population of 806,300, representing 84% of the ADI's residents. Though relatively small in Hispanic population (at 27,000), Santa Cruz County Hispanics represent 85% of that County's residents.

### TUCSON
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Cochise | AZ | 36.4 | 11.0 | 30.5% | 119.3 |
| Pima | AZ | 201.6 | 61.7 | 25.0 | 806.3 |
| Hidalgo | NM | 3.5 | 0.9 | 53.6 | 6.4 |
| Santa Cruz | AZ | 27.0 | 7.8 | 84.6 | 31.9 |
| TOTAL | | 268.5 | 81.4 | 27.8% | 964.0 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Hispanic males and females eighteen years and older represent 62% of the ADI Hispanic population and make up nearly the same share (30% versus 31% respectively). Hispanic men and women between the ages of 18 and 34 years represent 33% of the Hispanic population as compared to 14% for the 50 years and above segment.

**TUCSON**
**HISPANIC AGE/SEX DISTRIBUTION**
**1991**

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 18.2 | | 6.8% | |
| Males 25-34 | 26.3 | | 9.8 | |
| Males 35-49 | 19.6 | | 7.3 | |
| Males 50-54 | 4.0 | | 1.5 | |
| Males 55-64 | 7.8 | | 2.9 | |
| Males 65+ | 5.6 | | 2.1 | |
| **Males 18+** | | **81.5** | | **30.4%** |
| Females 18-24 | 17.8 | | 6.6 | |
| Females 25-34 | 25.6 | | 9.5 | |
| Females 35-49 | 19.9 | | 7.4 | |
| Females 50-54 | 4.7 | | 1.8 | |
| Females 55-64 | 9.2 | | 3.4 | |
| Females 65+ | 7.3 | | 2.7 | |
| **Females 18+** | | **84.5** | | **31.4** |
| **Teens (12-17)** | 32.0 | **32.0** | 11.9 | **11.9** |
| **Children (0-11)** | | **70.5** | | **26.3** |
| Children (2-11) | 58.5 | | 21.8 | |
| TOTAL 2+ | 256.5 | | 95.5% | |
| **TOTAL** | | **268.5** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 19

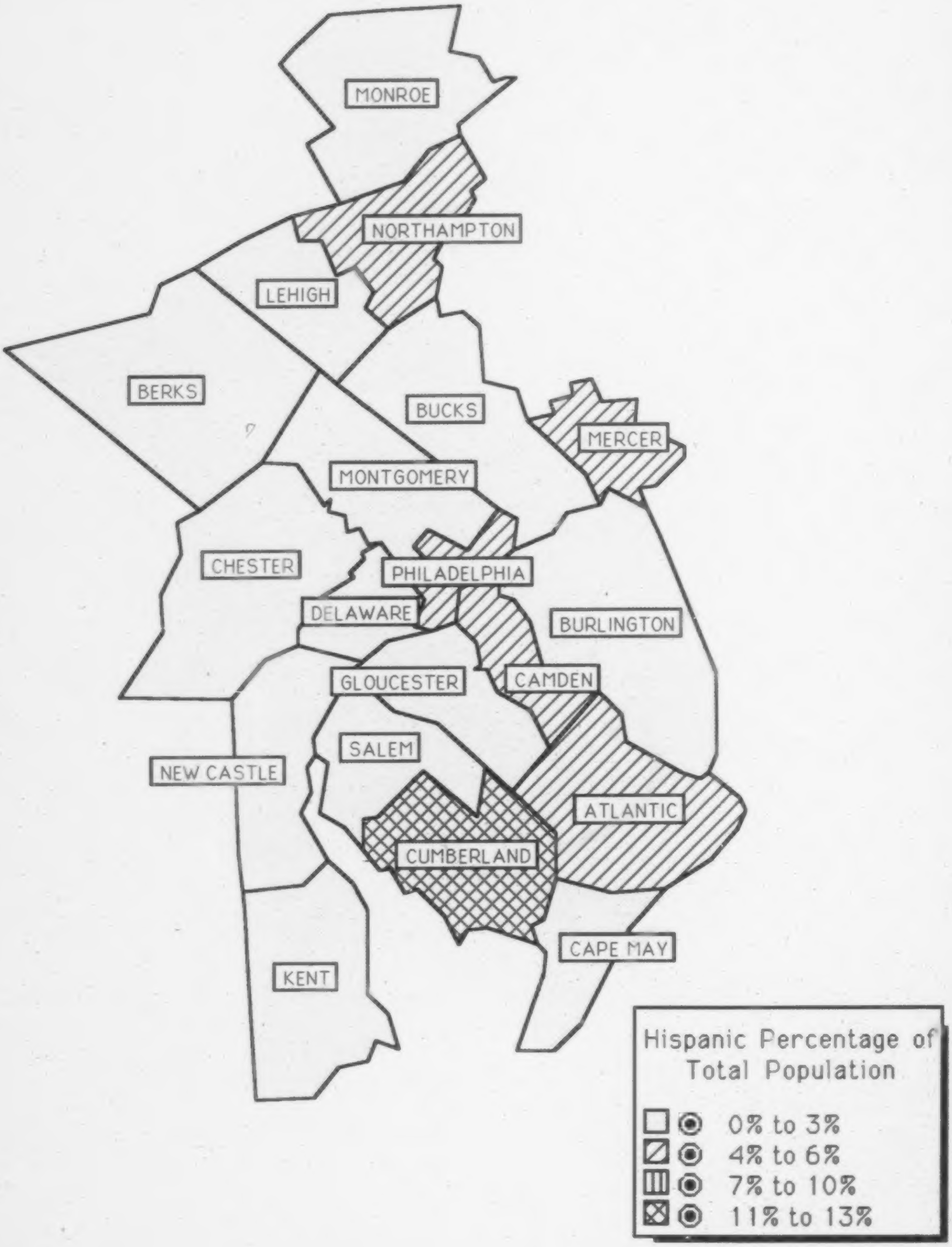
# PHILADELPHIA

*MARKET SIZE: 264,600 HISPANIC POPULATION*

### 1. Hispanic Population

The Philadelphia ADI is comprised of 21 counties (from the states of Pennsylvania, New Jersey, and Delaware), and has a combined estimated Hispanic population of 264,600, making it the nineteenth-ranked U.S. Hispanic market. The two counties having the most Hispanics are Philadelphia and Camden with 88,400 and 30,500 respectively. Combined, these two counties contain nearly 119,000 Hispanics or 45% of the ADI's total Hispanic population. Hispanic population growth in the Philadelphia ADI was 45% from 1980 to 1991.

# Philadelphia ADI


MONROE
NORTHAMPTON
LEHIGH
BERKS
BUCKS
MERCER
MONTGOMERY
CHESTER
PHILADELPHIA
DELAWARE
BURLINGTON
GLOUCESTER
CAMDEN
SALEM
NEW CASTLE
ATLANTIC
CUMBERLAND
CAPE MAY
KENT
Hispanic Percentage of Total Population
□ ◉ 0% to 3%
▨ ◉ 4% to 6%
▥ ◉ 7% to 10%
☒ ◉ 11% to 13%

## PHILADELPHIA
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Kent | DE | 1.7 | 2.0 | 2.6 | 2.7 |
| New Castle | DE | 7.1 | 8.3 | 9.7 | 10.3 |
| Atlantic | NJ | 7.6 | 9.6 | 10.8 | 11.1 |
| Burlington | NJ | 8.7 | 11.1 | 13.6 | 14.1 |
| Camden | NJ | 20.6 | 26.4 | 29.6 | 30.5 |
| Cape May | NJ | 1.2 | 1.4 | 1.8 | 2.0 |
| Cumberland | NJ | 12.5 | 15.5 | 17.7 | 18.2 |
| Gloucester | NJ | 2.4 | 2.8 | 3.4 | 3.5 |
| Mercer | NJ | 10.6 | 13.7 | 15.7 | 16.6 |
| Salem | NJ | 1.0 | 1.3 | 1.4 | 1.4 |
| Warren | NJ | 0.1 | 1.1 | NA | NA |
| Berks | PA | 9.0 | 11.0 | 12.1 | 12.9 |
| Bucks | PA | 5.7 | 7.1 | 7.8 | 8.5 |
| Chester | PA | 5.7 | 7.0 | 7.8 | 8.5 |
| Delaware | PA | 4.2 | 4.3 | 5.0 | 5.4 |
| Lehigh | PA | 7.1 | 9.2 | 10.4 | 11.2 |
| Monroe | PA | 0.6 | 0.7 | 0.9 | 1.0 |
| Montgomery | PA | 5.4 | 6.6 | 7.3 | 7.9 |
| Northampton | PA | 7.0 | 8.6 | 9.4 | 10.4 |
| Philadelphia | PA | 63.8 | 77.3 | 83.6 | 88.4 |
| Schuylkill | PA | NA | NA | NA | NA |
| TOTAL | | 182.0 | 225.0 | 250.6 | 264.6 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

The total population of the Philadelphia ADI is estimated at [illegible] million for 1991. Philadelphia County, the largest in the market, contains [illegible] over two million residents, representing 24% of the ADI's total population. While the percentage of Hispanics in the ADI is only 3%, this still represents more than one quarter-million people residing in 79,000 households. The average Hispanic household in this market contains 3.3 persons.

The greatest density of Hispanics exists in Cumberland County, N.J. where 12% are Hispanic.

### PHILADELPHIA
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Kent | DE | 2.7 | 0.8 | 2.2% | 124.0 |
| New Castle | DE | 10.3 | 3.0 | 2.2 | 468.3 |
| Atlantic | NJ | 11.1 | 3.2 | 4.8 | 231.5 |
| Burlington | NJ | 14.1 | 3.6 | 3.0 | 471.3 |
| Camden | NJ | 30.5 | 8.6 | 5.4 | 564.9 |
| Cape May | NJ | 2.0 | 0.5 | 1.8 | 108.7 |
| Cumberland | NJ | 18.2 | 5.2 | 11.7 | 155.4 |
| Gloucester | NJ | 3.5 | 1.1 | 1.5 | 235.7 |
| Mercer | NJ | 16.6 | 4.9 | 4.2 | 394.8 |
| Salem | NJ | 1.4 | 0.4 | 2.0 | 70.7 |
| Berks | PA | 12.9 | 3.9 | 3.3 | 390.2 |
| Bucks | PA | 8.5 | 2.7 | 1.4 | 610.6 |
| Chester | PA | 8.5 | 2.4 | 2.1 | 407.1 |
| Delaware | PA | 5.4 | 1.8 | 0.9 | 595.1 |
| Lehigh | PA | 11.2 | 3.6 | 3.0 | 374.2 |
| Monroe | PA | 1.0 | 0.3 | 1.0 | 103.0 |
| Montgomery | PA | 7.9 | 2.5 | 1.0 | 793.1 |
| Northampton | PA | 10.4 | 3.3 | 3.6 | 289.0 |
| Philadelphia | PA | 88.4 | 27.4 | 4.4 | 2,008.5 |
| TOTAL | | 264.6 | 79.2 | 3.2% | 8,396.1 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Hispanic males and females eighteen years and older represent 63% of the ADI's Hispanic population and make up nearly the same share (31% versus 32% respectively). Hispanic men and women between the ages of 18 and 34 years represent 34% of the Hispanic population as compared to 13% for the 50 years and above segment.

### PHILADELPHIA
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 19.1 | | 7.2% | |
| Males 25-34 | 27.4 | | 10.4 | |
| Males 35-49 | 19.7 | | 7.4 | |
| Males 50-54 | 3.4 | | 1.3 | |
| Males 55-64 | 6.9 | | 2.6 | |
| Males 65+ | 5.5 | | 2.1 | |
| **Males 18+** | | **82.0** | | **31.0%** |
| Females 18-24 | 18.4 | | 7.0 | |
| Females 25-34 | 26.8 | | 10.1 | |
| Females 35-49 | 20.6 | | 7.8 | |
| Females 50-54 | 4.1 | | 1.5 | |
| Females 55-64 | 8.1 | | 3.1 | |
| Females 65+ | 6.6 | | 2.5 | |
| **Females 18+** | | **84.6** | | **32.0** |
| **Teens (12-17)** | 30.6 | **30.6** | 11.5 | **11.5** |
| **Children (0-11)** | | **67.4** | | **25.5** |
| Children (2-11) | 55.9 | | 21.1 | |
| TOTAL 2+ | 253.1 | | 95.6% | |
| **TOTAL** | | **264.6** | | **100.0%** |

Source: Strategy Research Corporation

# SALINAS/MONTEREY

*MARKET SIZE: 237,600 HISPANIC POPULATION*

## 1. Hispanic Population

The Salinas/Monterey ADI is comprised of three counties located between San Francisco and Los Angeles. It is ranked as the twentieth most populated market in terms of Hispanic population size. Monterey County is the ADI's largest in terms of both Hispanic and total population, with an estimated 158,300 Hispanics, accounting for more than two-thirds of the ADI's Hispanic population.

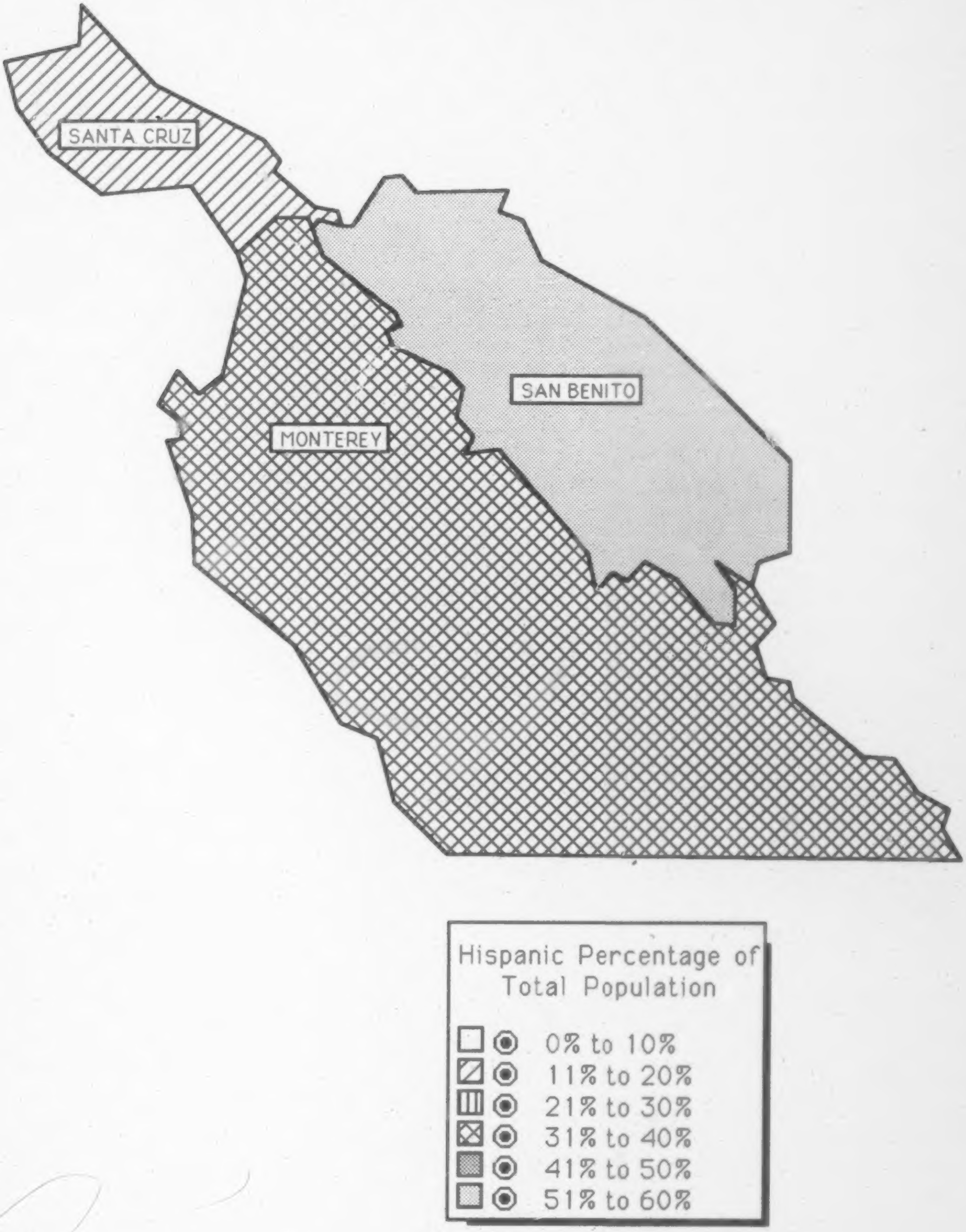
The Salinas/Monterey ADI Hispanic population has more than doubled since 1980 .

**SALINAS/MONTEREY HISPANIC POPULATION 1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Monterey | CA | 75.1 | 91.0 | 137.7 | 158.3 |
| San Benito | CA | 11.4 | 14.1 | 22.6 | 24.7 |
| Santa Cruz | CA | 27.7 | 36.1 | 50.8 | 54.6 |
| TOTAL | | 114.2 | 141.2 | 211.1 | 237.6 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Salinas/Monterey ADI


SANTA CRUZ
SAN BENITO
MONTEREY
Hispanic Percentage of Total Population
☐ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%
⊠ ◉ 31% to 40%
▩ ◉ 41% to 50%
▦ ◉ 51% to 60%

## 2. Hispanic Population/Households - Total Population

The total population for the Salinas/Monterey ADI is nearly 845,000. More than one-fourth of these residents are Hispanic and live in approximately 62,000 households. The average household size is 3.9 persons.

Monterey County contains the largest number of Hispanic households (41,200) in the three-county area, while the greatest density of Hispanics can be found in San Benito County where more than one-half are Hispanic.

### SALINAS/MONTEREY
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Monterey | CA | 158.3 | 41.2 | 32.1% | 493.1 |
| San Benito | CA | 24.7 | 6.7 | 53.0 | 46.6 |
| Santa Cruz | CA | 54.6 | 13.8 | 17.9 | 305.3 |
| TOTAL | | 237.6 | 61.7 | 28.1% | 844.9 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Hispanic males and females eighteen years and older represent 66% of the ADI's Hispanic population. Males represent 37% of this total as compared with 29% females. Men and women between the ages of 18 and 34 years represent 39% of the Hispanic population as compared to 12% for the 50 years and above segment.

### SALINAS/MONTEREY
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 23.1 | | 9.7% | |
| Males 25-34 | 32.0 | | 13.5 | |
| Males 35-49 | 18.1 | | 7.6 | |
| Males 50-54 | 3.4 | | 1.4 | |
| Males 55-64 | 6.5 | | 2.7 | |
| Males 65+ | 4.4 | | 1.9 | |
| **Males 18+** | | **87.5** | | **36.8%** |
| Females 18-24 | 15.1 | | 6.4 | |
| Females 25-34 | 22.5 | | 9.5 | |
| Females 35-49 | 16.9 | | 7.1 | |
| Females 50-54 | 3.2 | | 1.3 | |
| Females 55-64 | 6.5 | | 2.7 | |
| Females 65+ | 4.4 | | 1.9 | |
| **Females 18+** | | **68.6** | | **28.9** |
| **Teens (12-17)** | 26.9 | **26.9** | 11.3 | **11.3** |
| **Children (0-11)** | | **54.6** | | **23.0** |
| Children (2-11) | 45.8 | | 19.3 | |
| TOTAL 2+ | 228.8 | | 96.3% | |
| **TOTAL** | | **237.6** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 21

# AUSTIN

*MARKET SIZE: 224,400 HISPANIC POPULATION*

### 1. Hispanic Population

In the past five years, the Hispanic population of the Austin ADI has increased by 62% and by 103% since 1980. Located in southwest Texas, the ADI has an estimated total of 224,400 Hispanics residing in its twelve central Texas counties.

The city of Austin is located in Travis County, the ADI's largest county in terms of Hispanic population, comprising 142,600 persons of Hispanic descent.

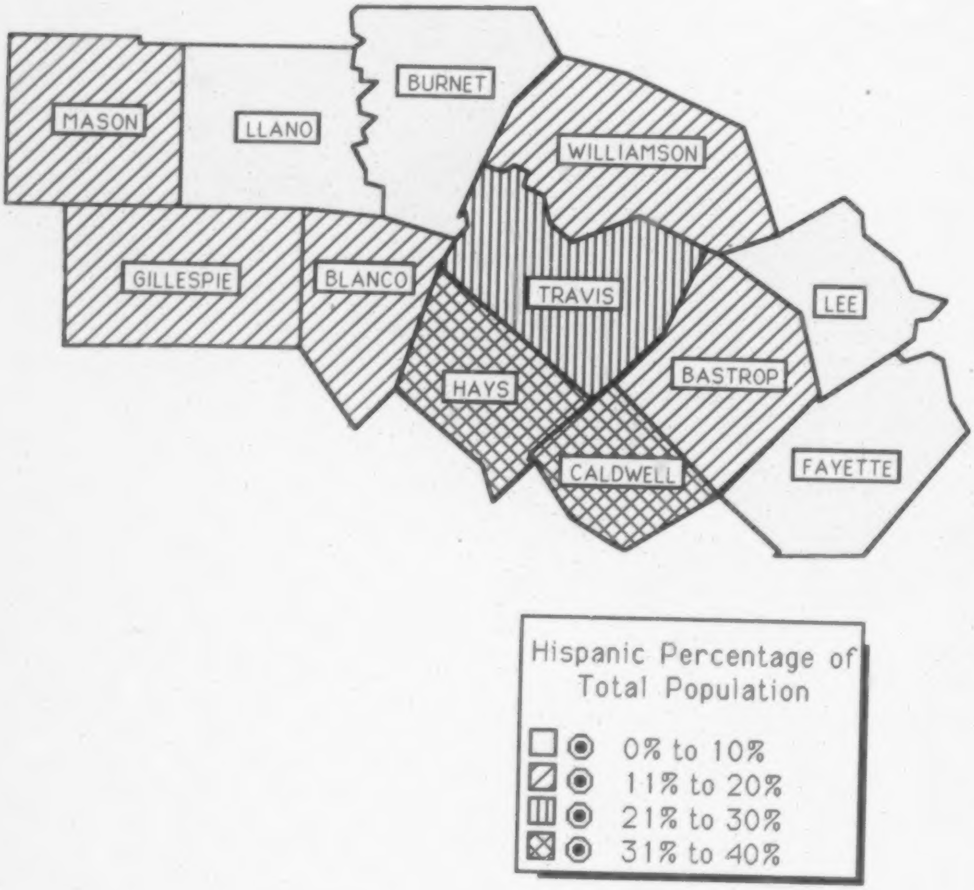
In addition, the tri-county metropolitan Austin area, consisting of Travis, Hays and Williamson counties, accounts for over 86% of the total Hispanic population in the ADI.

**AUSTIN**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Bastrop | TX | 3.4 | 4.3 | 7.5 | 8.1 |
| Blanco | TX | 0.4 | 0.5 | 0.7 | 0.7 |
| Burnet | TX | 1.3 | 1.6 | 2.6 | 2.8 |
| Caldwell | TX | 7.8 | 8.8 | 12.4 | 12.8 |
| Fayette | TX | 1.0 | 1.2 | 1.4 | 1.4 |
| Gillespie | TX | NA | NA | 2.2 | 2.3 |
| Hays | TX | 12.4 | 15.2 | 24.7 | 26.6 |
| Lee | TX | 0.6 | 0.8 | 1.1 | 1.2 |
| Llano | TX | 0.3 | 0.3 | 0.5 | 0.5 |

Continued...

# Austin ADI


MASON
LLANO
BURNET
WILLIAMSON
GILLESPIE
BLANCO
TRAVIS
LEE
HAYS
BASTROP
CALDWELL
FAYETTE
Hispanic Percentage of Total Population
☐ 0% to 10%
▨ 11% to 20%
▥ 21% to 30%
▩ 31% to 40%

## AUSTIN
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Mason | TX | 0.6 | 0.7 | 0.9 | 0.9 |
| San Saba | TX | 0.8 | NA | 1.2 | NA |
| Travis | TX | 72.3 | 91.5 | 137.5 | 142.6 |
| Williamson | TX | 9.7 | 13.1 | 22.5 | 24.5 |
| TOTAL | | 110.6 | 138.0 | 215.2 | 224.4 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

Approximately 21% of the total population for the Austin ADI consists of Hispanics (224,400 Hispanics and 1.1 million people).

Travis County is the largest county in terms of total Hispanic population, accounting for 64% of the ADI's 1991 estimated Hispanic population. Approximately 22% of the county's total population is Hispanic. Only four other counties in the ADI have more than 3,000 Hispanic residents. These are Harp, with 26,600, Williamson, with 24,500, Caldwell with 12,800, and Bastrop with 8,100.

Approximately 67% of the total Hispanic households of the ADI are in Travis County.

With a total Hispanic population an estimated 224,400 and a Hispanic household population of 64,200, the Austin ADI has 3.5 persons per Hispanic household.

### AUSTIN
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Bastrop | TX | 8.1 | 2.2 | 17.3% | 47.0 |
| Blanco | TX | 0.7 | 0.2 | 10.8 | 6.5 |
| Burnet | TX | 2.8 | 0.7 | 9.3 | 30.4 |
| Caldwell | TX | 12.8 | 3.3 | 40.1 | 31.9 |
| Fayette | TX | 1.4 | 0.4 | 6.8 | 20.6 |
| Gillespie | TX | 2.3 | 0.6 | 12.6 | 18.4 |
| Hays | TX | 26.6 | 7.1 | 37.7 | 70.5 |
| Lee | TX | 1.2 | 0.3 | 7.2 | 16.8 |
| Llano | TX | 0.5 | 0.2 | 3.2 | 15.6 |
| Mason | TX | 0.9 | 0.3 | 17.7 | 5.1 |
| San Saba | TX | NA | NA | NA | NA |
| Travis | TX | 142.6 | 42.7 | 22.0 | 648.2 |
| Williamson | TX | 24.5 | 6.2 | 15.4 | 159.2 |
| TOTAL | | 224.4 | 64.2 | 21.0% | 1,070.2 |

NA=Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

### 3. Age/Sex Of The Population

Adults 18-34 make up approximately 35% of the Hispanic population for the Austin ADI. Another 39% of the Hispanics in the ADI are under the age of 18.

The adult population for the Austin ADI is broken up into fairly equal proportions between males and females. Females account for 31% of the adult population, while males account for 30%.

**AUSTIN**
**HISPANIC AGE/SEX DISTRIBUTION**
**1991**

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 16.4 | | 7.3% | |
| Males 25-34 | 23.0 | | 10.3 | |
| Males 35-49 | 13.8 | | 6.1 | |
| Males 50-54 | 3.0 | | 1.3 | |
| Males 55-64 | 6.0 | | 2.7 | |
| Males 65+ | 4.5 | | 2.0 | |
| **Males 18+** | | **66.7** | | **29.7%** |
| Females 18-24 | 15.7 | | 7.0 | |
| Females 25-34 | 22.2 | | 9.9 | |
| Females 35-49 | 15.7 | | 7.0 | |
| Females 50-54 | 3.8 | | 1.7 | |
| Females 55-64 | 7.1 | | 3.1 | |
| Females 65+ | 5.8 | | 2.6 | |
| **Females 18+** | | **70.3** | | **31.3** |
| **Teens (12-17)** | 26.4 | **26.4** | 11.8 | **11.8** |
| **Children (0-11)** | | **61.0** | | **27.2** |
| Children (2-11) | 51.1 | | 22.8 | |
| TOTAL 2+ | 214.5 | | 95.6% | |
| **TOTAL** | | **224.4** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 22

# TAMPA/ST. PETERSBURG

*MARKET SIZE: 211,700 HISPANIC POPULATION*

## 1. Hispanic Population

The Hispanic population for the Tampa/St. Petersburg ADI has grown from 101,400 in 1980 to an estimated 211,700 in 1991. These figures show the market's Hispanic population has more than doubled during this period.

A large portion of the Hispanic population in the ADI is localized in Hillsborough County, which contains the the City of Tampa. Approximately 69% (145,200 persons) of all Hispanics in the ADI reside in this county.

Four counties make up the immediate Tampa/St. Petersburg metropolitan area. These are Hillsborough, Pinellas (St. Petersburg), Hernando and Pasco Counties. Together, these four counties account for 82% of the total Hispanic population of the market.

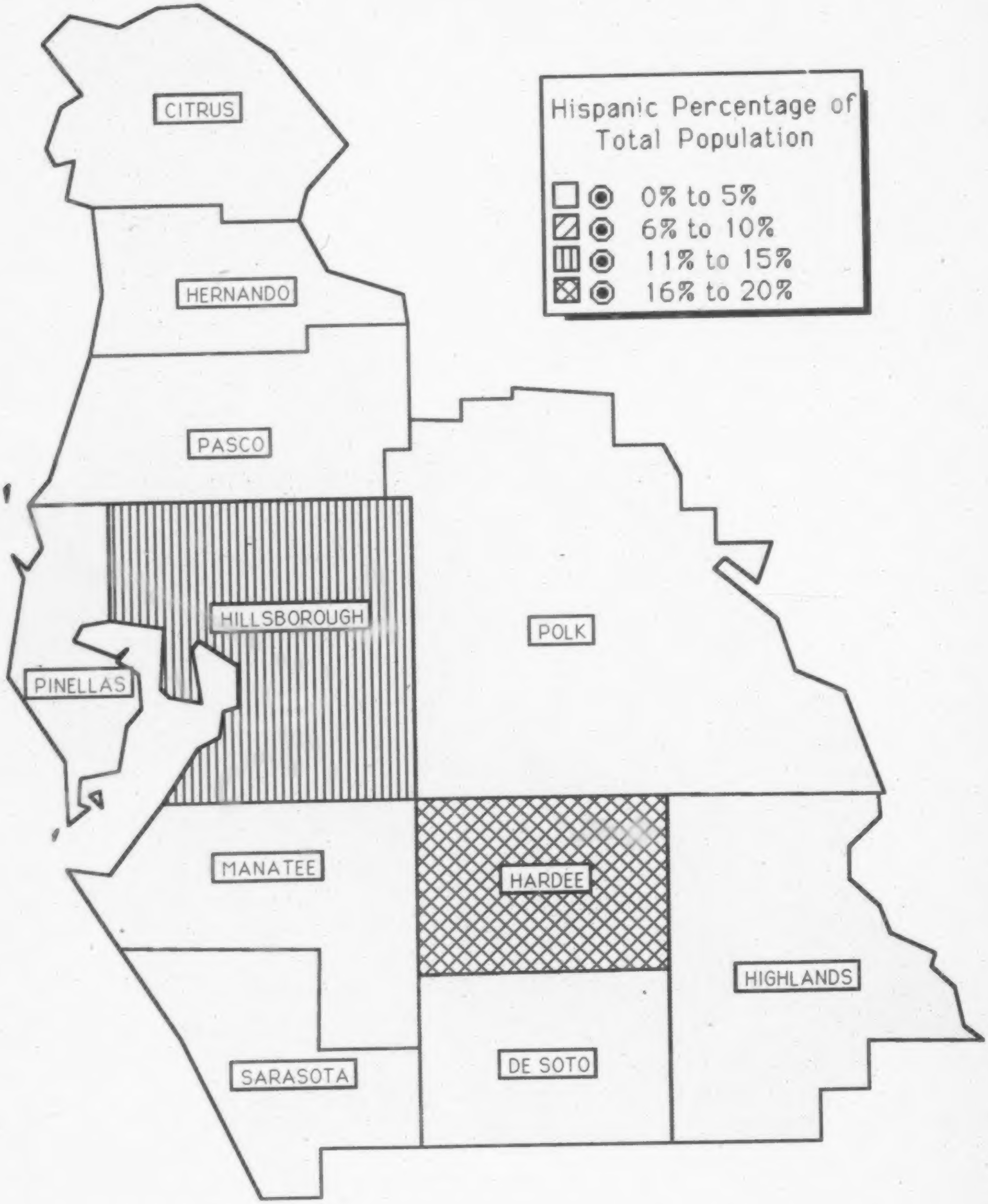
**TAMPA/ST. PETERSBURG**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Citrus | FL | 0.8 | 1.0 | 1.7 | 1.9 |
| De Soto | FL | 0.6 | 0.8 | 1.0 | 1.0 |
| Hardee | FL | 3.2 | 3.6 | 4.5 | 4.7 |
| Hernando | FL | 0.8 | 1.0 | 2.1 | 2.5 |
| Highlands | FL | 0.8 | 2.1 | 3.0 | 3.3 |
| Hillsborough | FL | 64.2 | 73.0 | 134.4 | 145.2 |
| Manatee | FL | 3.2 | 4.1 | 4.9 | 5.5 |
| Pasco | FL | 4.7 | 6.6 | 8.0 | 9.1 |
| Pinellas | FL | 10.5 | 13.6 | 15.7 | 16.7 |
| Polk | FL | 9.6 | 13.3 | 14.9 | 16.8 |
| Sarasota | FL | 3.0 | 3.6 | NA | 5.0 |
| TOTAL | | 101.4 | 122.7 | 190.2 | 211.7 |

NA=Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Tampa/St. Petersburg ADI


Hispanic Percentage of Total Population
☐ ◉ 0% to 5%
▨ ◉ 6% to 10%
▥ ◉ 11% to 15%
☒ ◉ 16% to 20%
CITRUS
HERNANDO
PASCO
HILLSBOROUGH
PINELLAS
POLK
MANATEE
HARDEE
HIGHLANDS
SARASOTA
DE SOTO

## 2. Hispanic Population/Households-Total Population

Hispanics comprise 6% of the total population of the Tampa/St. Petersburg ADI. There are an estimated 211,700 Hispanics and 3.7 million non-Hispanics in this market.

There are approximately 173,500 Hispanics living in the ADI's four county metropolitan area. They represent 7% of the total population for the metro area, which stands at 2.6 million, or about two thirds of the entire ADI.

Hillsborough County has 145,200 Hispanic and 899,700 non-Hispanic residents that account for a county population of just over 1 million. Hispanics represent 14% of Hillsborough County's total estimated 1991 population.

Approximately 74,300 of the households in the Tampa/St. Petersburg ADI are Hispanic; each has an average of 2.9 residents.

### TAMPA/ST. PETERSBURG
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Citrus | FL | 1.9 | 0.7 | 1.7% | 109.2 |
| De Soto | FL | 1.0 | 0.2 | 3.9 | 25.6 |
| Hardee | FL | 4.7 | 1.0 | 16.5 | 28.4 |
| Hernando | FL | 2.5 | 0.8 | 2.3 | 110.4 |
| Highlands | FL | 3.3 | 0.7 | 4.4 | 75.6 |
| Hillsborough | FL | 145.2 | 55.3 | 13.9 | 1,044.9 |
| Manatee | FL | 5.5 | 1.5 | 2.7 | 204.1 |
| Pasco | FL | 9.1 | 2.5 | 2.8 | 325.3 |
| Pinellas | FL | 16.7 | 6.3 | 1.5 | 1,115.2 |
| Sarasota | FL | 5.0 | 1.7 | 1.9 | 270.3 |
| Polk | FL | 16.8 | 3.6 | 3.0 | 558.8 |
| TOTAL | | 211.7 | 74.3 | 5.5% | 3,867.8 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

About 32% of the Hispanic population in the Tampa/St. Petersburg ADI is between the ages of 18 and 34. Individuals under the age of 18 make up another 31% of the total population, while those 55 and over comprise nearly 16%.

With regard to gender, the distribution of the adult population between the sexes is practically equal. Males form 35%, while female adults comprise 34% of the total adult population.

### TAMPA/ST. PETERSBURG
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 14.4 | | 6.8% | |
| Males 25-34 | 20.9 | | 9.9 | |
| Males 35-49 | 18.7 | | 8.8 | |
| Males 50-54 | 4.0 | | 1.9 | |
| Males 55-64 | 8.5 | | 4.0 | |
| Males 65+ | 6.7 | | 3.2 | |
| **Males 18+** | | **73.2** | | **34.6%** |
| Females 18-24 | 12.8 | | 6.1 | |
| Females 25-34 | 18.7 | | 8.8 | |
| Females 35-49 | 18.5 | | 8.7 | |
| Females 50-54 | 5.1 | | 2.4 | |
| Females 55-64 | 9.7 | | 4.6 | |
| Females 65+ | 7.9 | | 3.7 | |
| **Females 18+** | | **72.7** | | **34.3** |
| **Teens (12-17)** | 23.7 | **23.7** | 11.2 | **11.2** |
| **Children (0-11)** | | **42.1** | | **19.9** |
| Children (2-11) | 35.2 | | 16.6 | |
| TOTAL 2+ | 204.8 | | 96.7% | |
| **TOTAL** | | **211.7** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 23

# LAREDO

*MARKET SIZE:163,100 HISPANIC POPULATION*

### 1. Hispanic Population

The Hispanic population of the Laredo ADI has reached an estimated 163,100, an increase of 44% since 1985 and 70% since 1980. Laredo is the 23rd largest ADI in terms of Hispanic population, in the nation.

Webb and Zapata are the two counties that comprise the Laredo ADI. However, most of the Hispanics in the market reside in Webb.

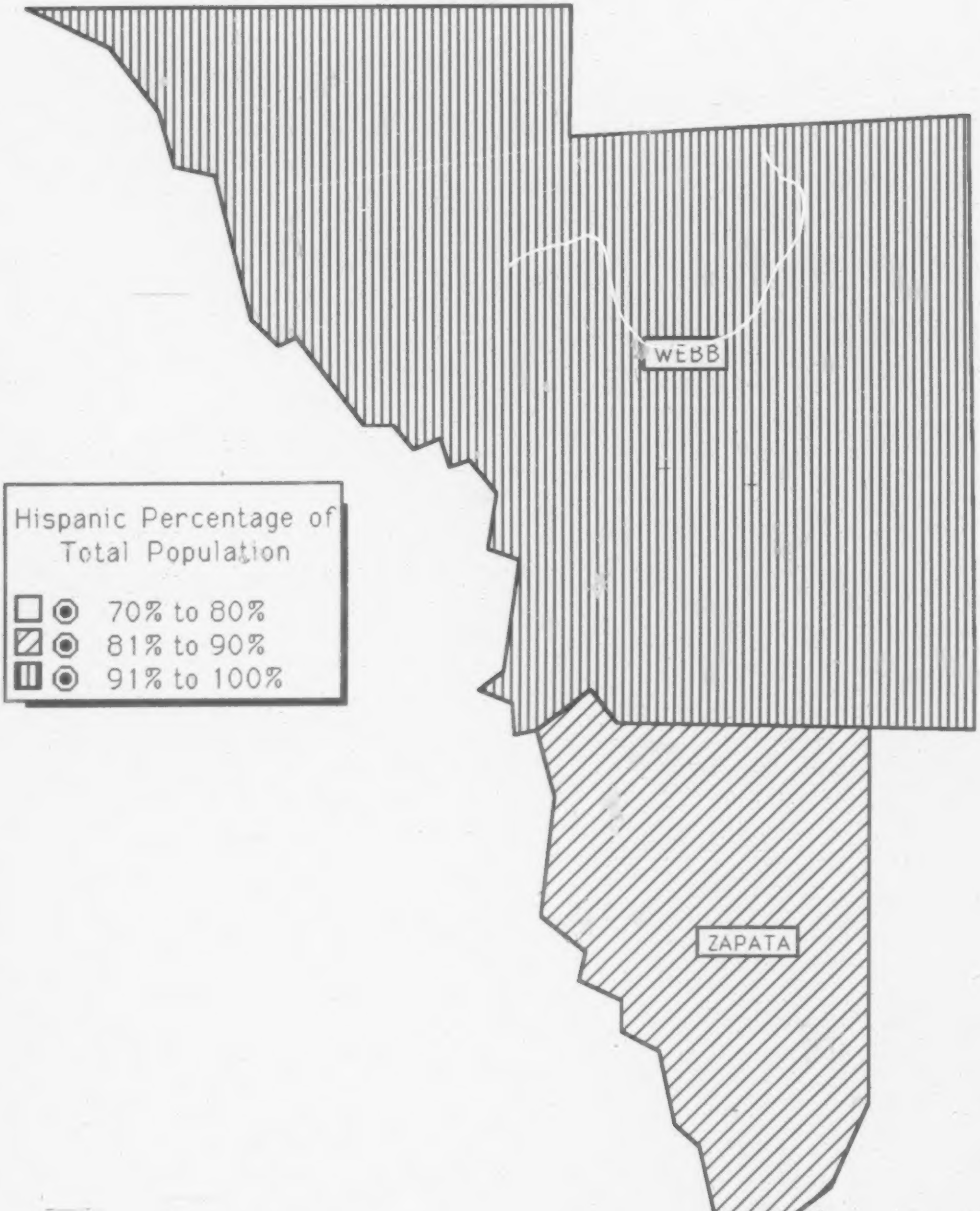
Webb County encompasses 94% of the market's Hispanic population at 153,400. Zapata has a count of 9,700 Hispanic's; a 6% share of the total Hispanic population.

**LAREDO**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Webb | TX | 90.8 | 106.9 | 146.6 | 153.4 |
| Zapata | TX | 5.0 | 6.2 | 9.4 | 9.7 |
| TOTAL | | 95.8 | 113.1 | 156.0 | 163.1 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Laredo ADI


WEBB
ZAPATA
Hispanic Percentage of Total Population
☐ ◉ 70% to 80%
▨ ◉ 81% to 90%
▥ ◉ 91% to 100%

## 2. Hispanic Population/Households-Total Population

Laredo is a predominantly Hispanic ADI with a total population of 171,500. In fact, the 163,100 Hispanic persons in the market account for 95% of the total ADI population, making Laredo the ADI with the highest Hispanic to non-Hispanic ratio in the United States.

Over 96% of all persons and about 94% of all households in Webb County are Hispanic (153,400 persons and 41,100 households). Moreover, 94% of the total Hispanic population for the Laredo ADI is situated in Webb County.

Although Zapata County is 83% Hispanic, only 6% of all Hispanics and households in the Laredo market are located there.

An average of 3.7 persons occupy each Hispanic household in the Laredo ADI. There are a total of 43,900 households headed by Hispanics in this region.

### LAREDO
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Webb | TX | 153.4 | 41.1 | 96.0% | 159.7 |
| Zapata | TX | 9.7 | 2.8 | 82.5 | 11.8 |
| TOTAL | | 163.1 | 43.9 | 95.1% | 171.5 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Hispanic Age/Sex Distribution

Adults 18+ outnumber the under 18 age group with a 61% share of the Laredo Hispanic population. The latter maintains a 39% share of the total Hispanic population in the market.

Females in the ADI predominate the gender category with 33% of the total 18+ population. Males represent a slightly lower percentage with approximately 28%.

### LAREDO
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 8.4 | | 5.1% | |
| Males 25-34 | 12.2 | | 7.5 | |
| Males 35-49 | 10.9 | | 6.7 | |
| Males 50-54 | 2.9 | | 1.8 | |
| Males 55-64 | 6.0 | | 3.7 | |
| Males 65+ | 4.8 | | 2.9 | |
| **Males 18+** | | **45.2** | | **27.7%** |
| Females 18-24 | 8.9 | | 5.5 | |
| Females 25-34 | 12.8 | | 7.8 | |
| Females 35-49 | 12.9 | | 7.9 | |
| Females 50-54 | 4.2 | | 2.6 | |
| Females 55-64 | 8.6 | | 5.3 | |
| Females 65+ | 6.7 | | 4.1 | |
| **Females 18+** | | **54.1** | | **33.2** |
| **Teens (12-17)** | 19.8 | **19.8** | 12.1 | **12.1** |
| **Children (0-11)** | | **44.0** | | **27.0** |
| Children (2-11) | 36.7 | | 22.5 | |
| TOTAL 2+ | 155.8 | | 95.5% | |
| **TOTAL** | | **163.1** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 24

# BOSTON

*MARKET SIZE:161,300 HISPANIC POPULATION*

### 1. Hispanic Population

Suffolk County, which contains the City of Boston, dominates the Boston ADI in terms of Hispanic population. Over 38% of the ADI's estimated 161,300 Hispanics live in Suffolk County. Middlesex and Essex Counties follow with 20% and 15% respectively.

Combined, these three counties account for 73% of the Boston ADI's total Hispanic population, and are home to 118,300 persons of Hispanic descent.

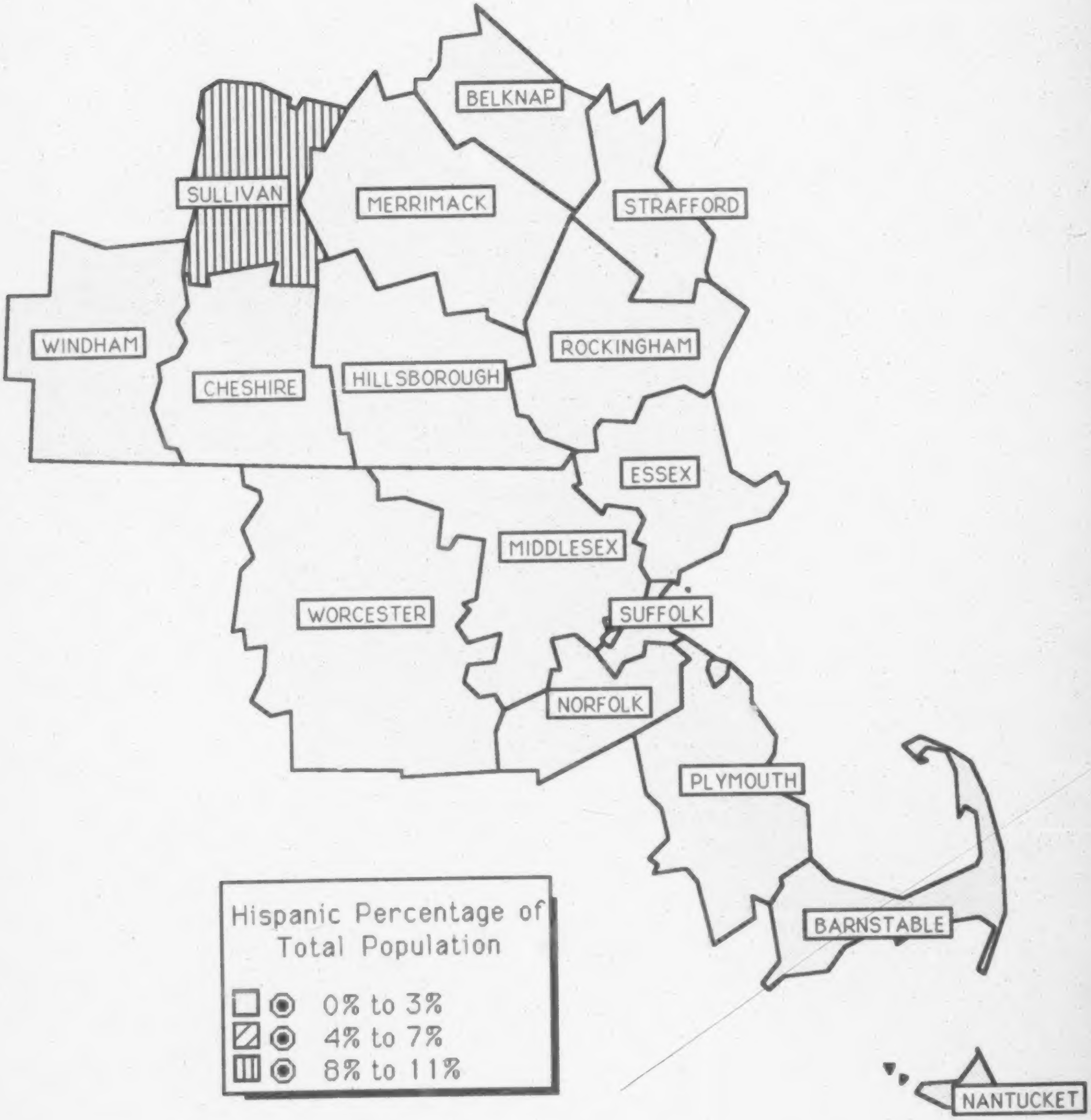
From 1985 to 1991, the estimated Hispanic population of the Boston market increased from 131,200 to 161,300. This is indicative of a 23% gain in the area's Hispanic population within the past six years.

**BOSTON**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Barnstable | MA | 1.0 | 1.3 | 1.7 | 1.9 |
| Essex | MA | 16.9 | 20.1 | 22.6 | 23.6 |
| Franklin | MA | NA | NA | NA | NA |
| Middlesex | MA | 23.5 | 28.0 | 31.4 | 32.7 |
| Nantucket | MA | * | * | * | * |
| Norfolk | MA | 4.6 | 4.9 | 5.5 | 5.9 |
| Plymouth | MA | 4.4 | 5.0 | 5.7 | 6.1 |
| Suffolk | MA | 40.1 | 48.6 | 54.4 | 62.0 |
| Worcester | MA | 14.2 | 17.7 | 19.7 | 21.3 |

Continued...

# Boston ADI


BELKNAP
SULLIVAN
MERRIMACK
STRAFFORD
WINDHAM
ROCKINGHAM
CHESHIRE
HILLSBOROUGH
ESSEX
MIDDLESEX
WORCESTER
SUFFOLK
NORFOLK
PLYMOUTH
BARNSTABLE
NANTUCKET
Hispanic Percentage of Total Population
☐ ◉ 0% to 3%
▨ ◉ 4% to 7%
▥ ◉ 8% to 11%

## BOSTON
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Belknap | NH | NA | 0.2 | NA | 0.3 |
| Cheshire | NH | 0.2 | 0.3 | 0.5 | 0.6 |
| Hillsborough | NH | 2.2 | 2.4 | 3.1 | 3.3 |
| Merrimack | NH | 0.4 | 0.5 | 0.6 | 0.6 |
| Rockingham | NH | 1.2 | 1.3 | 1.8 | 1.9 |
| Strafford | NH | 0.5 | 0.5 | 0.7 | 0.7 |
| Sullivan | NH | 0.1 | 0.1 | 0.1 | 0.1 |
| Windham | VT | 0.3 | 0.3 | 0.3 | 0.3 |
| TOTAL | | 109.6 | 131.2 | 148.1 | 161.3 |

NA = Not Applicable

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

Middlesex is the most populated county in the Boston ADI with 1.7 million out of its estimated 6.7 million total inhabitants. Of these, only 2% (32,700) are estimated to be of Hispanic origin. Worcester is the second-most populated county with 868,800 residents, of which 2.5% are Hispanic.

Overall, there are 16 counties in the ADI. However, most of the ADI's Hispanics are centralized in Suffolk County. Suffolk is home to 62,000 Hispanics who represent 8% of the county's population and 1% of the ADI's total population.

Hispanics in the Boston ADI are distributed among 50,700 households. With a total of approximately 161,300 Hispanics in the market, the average persons per household for this group is 3.2.

### BOSTON
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Barnstable | MA | 1.9 | 0.6 | 0.8% | 234.0 |
| Essex | MA | 23.6 | 7.2 | 3.0 | 785.4 |
| Middlesex | MA | 32.7 | 10.4 | 2.0 | 1,679.1 |
| Nantucket | MA | * | * | 0.7 | 6.1 |
| Norfolk | MA | 5.9 | 1.9 | 0.9 | 652.3 |
| Plymouth | MA | 6.1 | 1.9 | 1.2 | 506.4 |
| Suffolk | MA | 62.0 | 20.2 | 7.5 | 826.5 |
| Worcester | MA | 21.3 | 6.2 | 2.5 | 868.8 |
| Cheshire | NH | 0.6 | 0.2 | 0.2 | 127.2 |
| Hillsborough | NH | 3.3 | 1.0 | 0.9 | 356.3 |
| Merrimack | NH | 0.6 | 0.2 | 0.4 | 140.8 |
| Rockingham | NH | 1.9 | 0.5 | 0.7 | 291.0 |
| Strafford | NH | 0.7 | 0.2 | 0.5 | 130.3 |
| Sullivan | NH | 0.1 | * | 0.3 | 39.5 |
| Belknap | NH | 0.3 | 0.1 | 1.2 | 54.3 |
| Windham | VT | 0.3 | 0.1 | 0.7 | 44.3 |
| TOTAL | | 161.3 | 50.7 | 2.4% | 6,742.3 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Approximately two-thirds of the Hispanic population in the Boston ADI is over the age of 18. Consequently, the Hispanic market in this ADI is somewhat older than average.

Teens between the ages of 12 and 17 comprise another 10% of the Hispanic population. And lastly, children ranging from ages of less than 1 year to eleven account for 24%.

A population that is 33% male and 32% female presents very little distinction in the gender distribution for the Boston ADI.

### BOSTON
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 14.2 | | 8.8% | |
| Males 25-34 | 20.4 | | 12.7 | |
| Males 35-49 | 12.0 | | 7.4 | |
| Males 50-54 | 1.6 | | 1.0 | |
| Males 55-64 | 3.1 | | 1.9 | |
| Males 65+ | 2.6 | | 1.6 | |
| **Males 18+** | | **53.9** | | **33.4%** |
| Females 18-24 | 12.6 | | 7.8 | |
| Females 25-34 | 18.2 | | 11.3 | |
| Females 35-49 | 12.0 | | 7.5 | |
| Females 50-54 | 2.1 | | 1.3 | |
| Females 55-64 | 4.2 | | 2.6 | |
| Females 65+ | 3.1 | | 1.9 | |
| **Females 18+** | | **52.2** | | **32.4** |
| **Teens (12-17)** | 16.2 | **16.2** | 10.0 | **10.0** |
| **Children (0-11)** | | **39.0** | | **24.2** |
| Children (2-11) | 32.1 | | 19.9 | |
| TOTAL 2+ | 154.4 | | 95.7% | |
| **TOTAL** | | **161.3** | | **100.0%** |

Source:Strategy Research Corporation

## MARKET 25

# ODESSA/MIDLAND

*MARKET SIZE:155,300 HISPANIC POPULATION*

## 1. Hispanic Population

The Odessa/Midland ADI is located in the west section of Texas. The market's total 1991 Hispanic population is estimated at 155,300. Contrastingly, the 1980 Census reported there were 90,300 Hispanics residing in Odessa/Midland at the time. Thus, between 1980 and 1991 there was a 72% increase in the Hispanic population for the ADI.

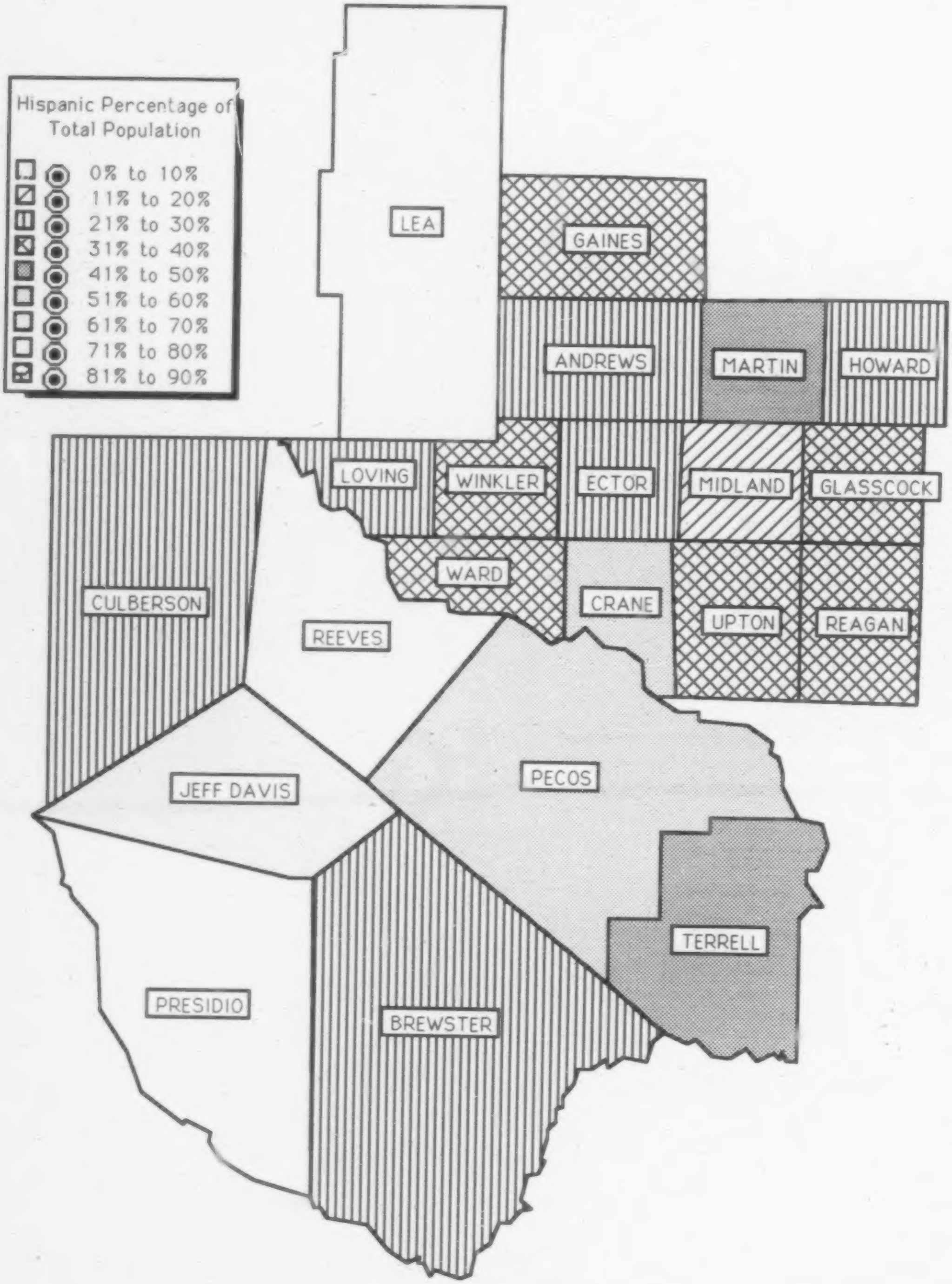
This market's Hispanic population is distributed among 22 counties. Ector county, in which Odessa is located, has 30% (46,200) of the ADI's total Hispanic population. Ector is followed by Midland County with an 18% share of the ADI's Hispanics (27,100).

**ODESSA/MIDLAND**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Lea South | NM | 1.2 | 2.0 | 2.2 | 2.2 |
| Andrews | TX | 2.9 | 4.0 | 4.9 | 4.9 |
| Brewster | TX | 3.3 | 3.5 | 4.1 | 4.7 |
| Crane | TX | 1.2 | 1.3 | 1.4 | 1.4 |
| Crockett | TX | 2.1 | 2.5 | NA | NA |
| Culberson | TX | 2.1 | NA | NA | 3.2 |
| Ector | TX | 24.8 | 32.0 | 45.3 | 46.2 |
| Gaines | TX | NA | NA | 5.9 | 6.1 |
| Glasscock | TX | 0.4 | 0.4 | 0.6 | 0.7 |
| Howard | TX | 7.0 | 7.6 | 9.7 | 10.1 |

Continued...

# Odessa/Midland ADI


Hispanic Percentage of Total Population
0% to 10%
11% to 20%
21% to 30%
31% to 40%
41% to 50%
51% to 60%
61% to 70%
71% to 80%
81% to 90%
LEA
GAINES
ANDREWS
MARTIN
HOWARD
LOVING
WINKLER
ECTOR
MIDLAND
GLASSCOCK
CULBERSON
WARD
CRANE
UPTON
REAGAN
REEVES
PECOS
JEFF DAVIS
TERRELL
PRESIDIO
BREWSTER

## ODESSA/MIDLAND HISPANIC POPULATION

### 1980, 1985, 1989, 1991

(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Jeff Davis | TX | 0.8 | 1.0 | 1.3 | 1.5 |
| Loving | TX | * | * | * | * |
| Martin | TX | 1.6 | 1.9 | 2.2 | 2.2 |
| Midland | TX | 12.3 | 15.9 | 25.9 | 27.1 |
| Pecos | TX | 7.1 | 8.4 | 11.6 | 12.2 |
| Presidio | TX | 4.0 | 4.4 | 5.1 | 5.9 |
| Reagan | TX | 1.3 | 1.6 | 2.3 | 2.2 |
| Reeves | TX | 9.8 | 10.7 | 12.2 | 12.9 |
| Terrell | TX | 0.7 | 0.7 | 0.8 | 0.8 |
| Upton | TX | 1.3 | 1.4 | 2.0 | 1.9 |
| Ward | TX | 3.8 | 4.3 | 5.4 | 5.4 |
| Winkler | TX | 2.6 | 3.0 | 3.5 | 3.6 |
| TOTAL | | 90.3 | 106.6 | 146.4 | 155.3 |

NA = Not Applicable

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

Hispanics constitute 31% of the total population in the Odessa/Midland ADI. The total population for the market is 502,400, of these, 155,300 are Hispanic.

There are 41,700 Hispanic households within this market; the average household size among Hispanics is high, at 3.7 persons.

### ODESSA/MIDLAND
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Lea South | NM | 2.2 | 0.6 | 22.0% | 10.0 |
| Andrews | TX | 4.9 | 1.2 | 26.7 | 18.4 |
| Brewster | TX | 4.7 | 1.5 | 51.8 | 9.0 |
| Crane | TX | 1.4 | 0.4 | 28.1 | 5.0 |
| Ector | TX | 46.2 | 12.7 | 27.2 | 169.7 |
| Gaines | TX | 6.1 | 1.5 | 37.5 | 16.2 |
| Glasscock | TX | 0.7 | 0.1 | 33.5 | 2.2 |
| Howard | TX | 10.1 | 2.9 | 25.7 | 39.3 |
| Jeff Davis | TX | 1.5 | 0.4 | 60.7 | 2.4 |
| Loving | TX | * | * | 22.0 | 0.1 |
| Martin | TX | 2.2 | 0.5 | 40.8 | 5.4 |
| Midland | TX | 27.1 | 7.2 | 20.2 | 134.2 |
| Pecos | TX | 12.2 | 3.1 | 59.1 | 20.7 |
| Presidio | TX | 5.9 | 1.7 | 91.4 | 6.5 |
| Reagan | TX | 2.2 | 0.5 | 40.1 | 5.6 |
| Reeves | TX | 12.9 | 3.4 | 72.8 | 17.8 |
| Terrell | TX | 0.8 | 0.3 | 44.6 | 1.8 |
| Upton | TX | 1.9 | 0.5 | 34.0 | 5.7 |
| Ward | TX | 5.4 | 1.4 | 32.6 | 16.6 |
| Culberson | TX | 3.2 | 0.9 | 77.3 | 4.1 |
| Winkler | TX | 3.6 | 0.9 | 31.0 | 11.7 |
| TOTAL | | 155.3 | 41.7 | 30.9% | 502.4 |

* Designates a less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## MARKET 26

# BAKERSFIELD

*MARKET SIZE:155,200 HISPANIC POPULATION*

### 1. Hispanic Population

Kern West is the only county in the Bakersfield, California ADI. With an estimated Hispanic population of 155,200, it is the 26th largest Hispanic ADI in the U.S..

In 1985 there were an estimated 91,500 Hispanics in Bakersfield, and 87,000 in 1980. The 1991 population estimate illustrates an increase of 70% in the number of Hispanics residing in this area since 1980.

**BAKERSFIELD**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Kern West | CA | 87.0 | 91.5 | 136.3 | 155.2 |
| TOTAL | | 87.0 | 91.5 | 136.3 | 155.2 |

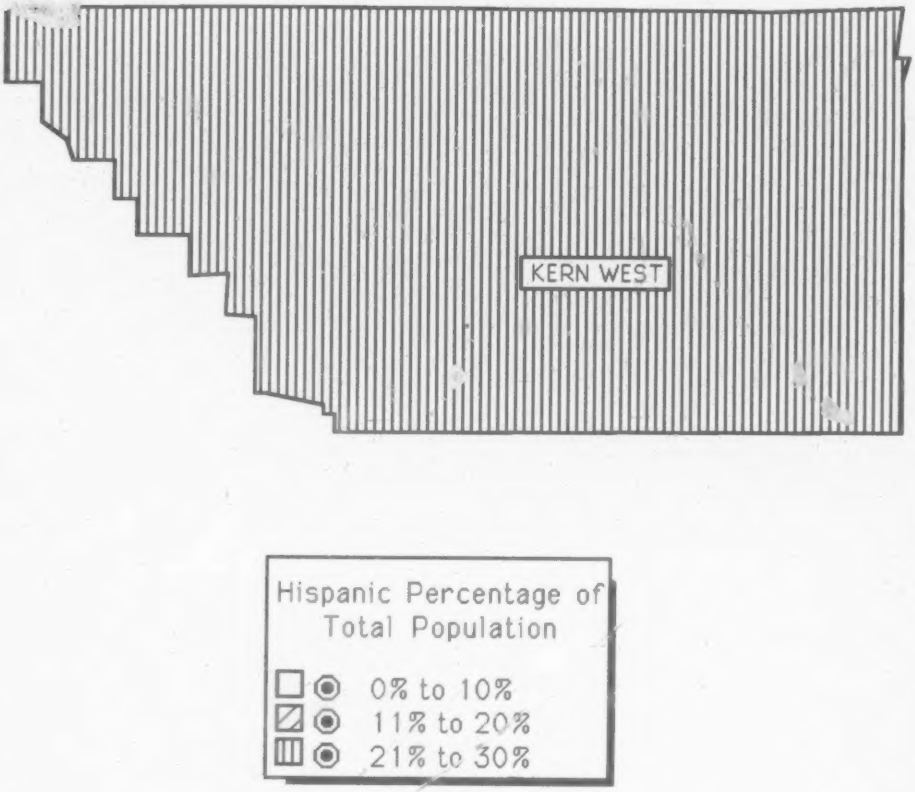
Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## ODESSA/MIDLAND
## HISPANIC AGE/SEX DISTRIBUTION
## 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 10.0% | | 6.4% | |
| Males 25-34 | 14.2 | | 9.1 | |
| [illegible] 35-49 | 10.8 | | 6.9 | |
| [illegible] 50-54 | 2.1 | | 1.4 | |
| Males 55-64 | 3.9 | | 2.5 | |
| Males 65+ | 3.5 | | 2.2 | |
| **Males 18+** | | **44.5%** | | **28.6%** |
| Females 18-24 | 9.7 | | 6.2 | |
| Females 25-34 | 13.7 | | 8.8 | |
| Females 35-49 | 11.4 | | 7.3 | |
| Females 50-54 | 2.2 | | 1.4 | |
| Females 55-64 | 4.3 | | 2.7 | |
| Females 65+ | 3.7 | | 2.3 | |
| **Females 18+** | | **45.0** | | **28.9** |
| **Teens (12-17)** | **21.1** | **21.1** | **13.6** | **13.6** |
| **Children (0-11)** | | **44.7** | | **28.[illegible]** |
| Children (2-11) | 37.[illegible] | | 24.1 | |
| TOTAL 2+ | 148.[illegible] | | 95.2 | |
| **TOTAL** | | **155.3** | | **100.0%** |

Source: Strategy Research Corporation

# Bakersfield ADI


KERN WEST
Hispanic Percentage of Total Population
☐ ● 0% to 10%
▨ ● 11% to 20%
▥ ● 21% to 30%

## 2. Hispanic Population/Households - Total Population

The Bakersfield ADI has a current estimated total population of 574,800. Twenty-seven percent of the county's population is of Hispanic origin.

An estimated 40,000 households in Kern West are headed by Hispanics. In addition, the household occupancy rate is unusually high, at about four persons.

### BAKERSFIELD
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Kern West | CA | 155.2 | 40.0 | 27.0% | 574.8 |
| TOTAL | | 155.2 | 40.0 | 27.0% | 574.8 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Adults 18+ account for 60% of the Hispanic population of the Bakersfield ADI. Of these individuals 47% are under the age of 49. Another 26% of the region's Hispanics are under 12 years of age.

The adult gender distribution favors males, who comprise 32% of the Hispanic population. Females 18+ account for about 28% of the total.

**BAKERSFIELD**
**HISPANIC AGE/SEX DISTRIBUTION**
**1991**

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 10.5 | | 6.8% | |
| Males 25-34 | 15.2 | | 9.8 | |
| Males 35-49 | 12.4 | | 8.0 | |
| Males 50-54 | 2.5 | | 1.6 | |
| Males 55-64 | 5.0 | | 3.2 | |
| Males 65+ | 3.4 | | 2.2 | |
| **Males 18+** | | **49.0** | | **31.6%** |
| Females 18-24 | 9.4 | | 6.1 | |
| Females 25-34 | 14.3 | | 9.2 | |
| Females 35-49 | 11.0 | | 7.1 | |
| Females 50-54 | 2.0 | | 1.3 | |
| Females 55-64 | 4.3 | | 2.8 | |
| Females 65+ | 2.7 | | 1.7 | |
| **Females 18+** | | **43.7** | | **28.2** |
| **Teens (12-17)** | 22.2 | **22.2** | 14.3 | **14.3** |
| **Children (0-11)** | | **40.3** | | **25.9** |
| Children (2-11) | 33.0 | | 21.2 | |
| TOTAL 2+ | 147.9 | | 95.3% | |
| **TOTAL** | | **155.2** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 27

# LUBBOCK

*MARKET SIZE:151,200 HISPANIC POPULATION*

### 1. Hispanic Population

Following the 1980 Census, the Hispanic population in the Lubbock ADI has grown from 104,500 to an estimated 151,200. Thus, there has been a 45% increase in the area's Hispanic population.

Furthermore, since the 1985 population estimates, which set the Hispanic population for the ADI at 124,700, a growth of 21% has occurred.

The Lubbock ADI is composed of 22 counties and is situated in the northwestern part of Texas. Lubbock County, is the major metropolitan area for the market with an estimated 1991 Hispanic population of 71,100.

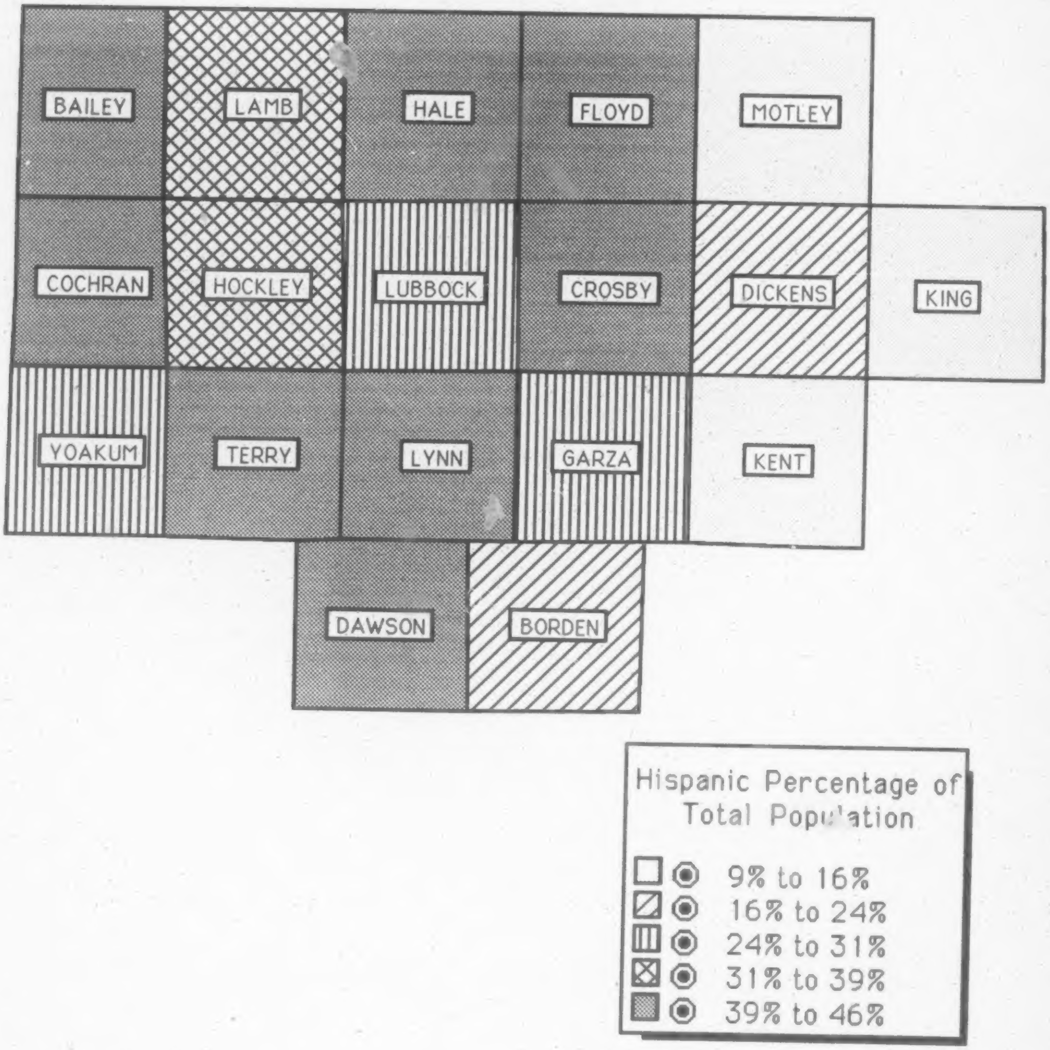
Currently, the Lubbock County Hispanic population supersedes the 1985 estimate of 48,700 persons by 46%. In addition, this county contains 47% of the ADI's total Hispanics.

**LUBBOCK**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| De Baca | NM | 0.8 | 0.9 | NA | NA |
| Roosevelt | NM | NA | 3.8 | NA | NA |
| Bailey | TX | 2.8 | 3.1 | 3.6 | 3.9 |
| Borden | TX | 0.1 | 0.1 | 0.1 | 0.1 |
| Cochran | TX | 1.7 | 1.8 | 2.5 | 2.7 |
| Crosby | TX | 3.3 | 3.5 | 4.2 | 4.2 |
| Dawson | TX | 6.1 | 6.7 | 8.3 | 8.6 |
| Dickens | TX | 0.6 | 0.7 | 0.9 | 0.9 |
| Floyd | TX | 3.3 | 3.7 | 4.3 | 4.6 |
| Gaines | TX | 4.0 | 4.7 | NA | NA |
| Garza | TX | 1.3 | 1.5 | 1.7 | 1.7 |

Continued...

# Lubbock ADI


BAILEY
LAMB
HALE
FLOYD
MOTLEY
COCHRAN
HOCKLEY
LUBBOCK
CROSBY
DICKENS
KING
YOAKUM
TERRY
LYNN
GARZA
KENT
DAWSON
BORDEN
Hispanic Percentage of Total Population
☐ 9% to 16%
▨ 16% to 24%
▥ 24% to 31%
☒ 31% to 39%
▩ 39% to 46%

## LUBBOCK
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Hale | TX | 12.7 | 15.1 | 18.6 | 19.8 |
| Hockley | TX | 6.3 | 7.7 | 10.5 | 10.6 |
| Kent | TX | 0.1 | 0.1 | 0.1 | 0.1 |
| King | TX | NA | NA | * | * |
| Lamb | TX | 5.8 | 6.4 | 7.6 | 7.7 |
| Lubbock | TX | 41.4 | 48.7 | 67.3 | 71.1 |
| Lynn | TX | 3.3 | 3.5 | 4.3 | 4.3 |
| Motley | TX | 0.2 | 0.2 | 0.2 | 0.2 |
| Scurry | TX | 3.4 | 4.1 | NA | NA |
| Terry | TX | 5.0 | 5.6 | 7.1 | 7.2 |
| Yoakum | TX | 2.3 | 2.8 | 4.0 | 3.5 |
| TOTAL | | 104.5 | 124.7 | 145.3 | 151.2 |

NA = Not Applicable

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

More than 67% of the Lubbock ADI Hispanic population is distributed among three of its twenty-two counties. As mentioned, the largest group of Hispanics is found in Lubbock County; about 71,100 persons. Next in order is Hale County with 19,800 Hispanics, and the third is Hockley with 10,600 inhabitants of Hispanic descent.

Lubbock County has the largest number of Hispanic households. There are 18,700 households headed by Hispanics, creating an average of 3.8 people per dwelling. For the ADI as a whole there are a total of 38,000 households, or an average household size of 4.0 persons.

### LUBBOCK
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Bailey | TX | 3.9 | 0.9 | 40.0% | 9.7 |
| Borden | TX | 0.1 | * | 16.8 | 0.6 |
| Cochran | TX | 2.7 | 0.7 | 43.6 | 6.3 |
| Crosby | TX | 4.2 | 1.0 | 45.3 | 9.4 |
| Dawson | TX | 8.6 | 2.1 | 46.3 | 18.5 |
| Dickens | TX | 0.9 | 0.2 | 20.1 | 4.5 |
| Floyd | TX | 4.6 | 1.0 | 40.3 | 11.4 |
| Garza | TX | 1.7 | 0.4 | 28.5 | 6.1 |
| Hale | TX | 19.8 | 4.7 | 41.2 | 48.0 |

Continued...

## LUBBOCK
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991

(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Hockley | TX | 10.6 | 2.6 | 33.6 | 31.6 |
| Kent | TX | 0.1 | * | 9.2 | 1.1 |
| King | TX | * | * | 12.0 | 0.4 |
| Lamb | TX | 7.7 | 1.8 | 37.5 | 20.5 |
| Lubbock | TX | 71.1 | 18.7 | 24.7 | 287.9 |
| Lynn | TX | 4.3 | 1.0 | 46.3 | 9.4 |
| Motley | TX | 0.2 | 0.1 | 11.8 | 1.7 |
| Terry | TX | 7.2 | 1.8 | 43.0 | 16.7 |
| Yoakum | TX | 3.5 | 0.9 | 30.0 | 11.7 |
| TOTAL | | 151.2 | 38.0 | 30.5% | 495.5 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Adults 18+ in the Lubbock ADI account for 57% of its total Hispanic population. Approximately 33% of the total Hispanic population of this market is between the ages of 18 and 34.

The ratio between adult men and women in the Lubbock market is somewhat equal. Adult men make up 29% of the total population and women account for 27%. The balance of the population consists 14% of teenagers, 29% children between the ages of two and eleven, and 4.4% 0-2 years.

### LUBBOCK
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 10.8 | | 7.1% | |
| Males 25-34 | 15.6 | | 10.3 | |
| Males 35-49 | 11.1 | | 7.3 | |
| Males 50-54 | 1.6 | | 1.1 | |
| Males 55-64 | 3.1 | | 2.1 | |
| Males 65+ | 2.2 | | 1.5 | |
| **Males 18+** | | **44.4** | | **29.4%** |
| Females 18-24 | 9.8 | | 6.5 | |
| Females 25-34 | 13.9 | | 9.2 | |
| Females 35-49 | 10.7 | | 7.1 | |
| Females 50-54 | 1.5 | | 1.0 | |
| Females 55-64 | 3.1 | | 2.0 | |
| Females 65+ | 2.4 | | 1.6 | |
| **Females 18+** | | **41.4** | | **27.4** |
| **Teens (12-17)** | 21.5 | **21.5** | 14.2 | **14.2** |
| **Children (0-11)** | | **43.9** | | **29.0** |
| Children (2-11) | 37.3 | | 24.6 | |
| TOTAL 2+ | 144.6 | | 95.6% | |
| **TOTAL** | | **151.2** | | **100.0%** |

Source: Strategy Research Corporation

**MARKET 28**

# EL CENTRO/YUMA

*MARKET SIZE:144,800 HISPANIC POPULATION*

## 1. Hispanic Population

El Centro/Yuma is the 28th largest U.S. Hispanic ADI. It is situated partly in Arizona and partly in Yuma, California, consisting of two counties: Imperial County, in California, which contains nearly 70% of the ADI's total population, and Yuma County in Arizona, containing the remaining 30%. The ADI's total Hispanic population is 144,800.

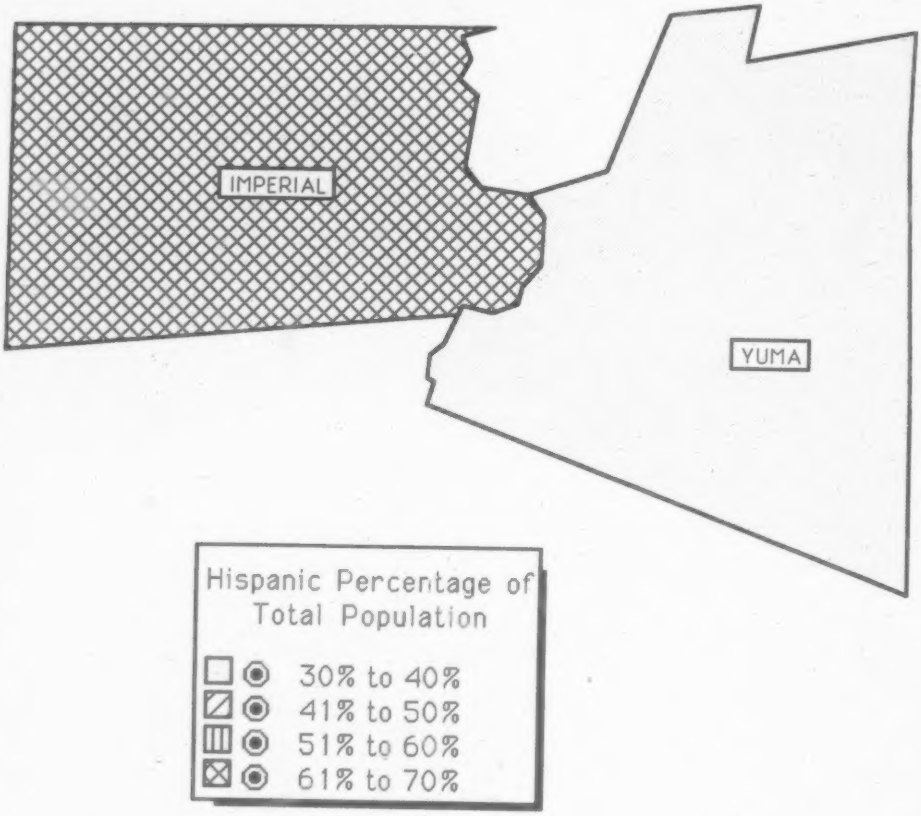
Both the ADI's counties have experienced substantial increases in their Hispanic populations since 1985. Yuma has grown by 49%, while Imperial has increased by 60%.

**EL CENTRO/YUMA**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Yuma | AZ | 26.6 | 30.3 | 41.7 | 45.1 |
| Imperial | CA | 51.4 | 62.5 | 94.1 | 99.7 |
| TOTAL | | 78.0 | 92.8 | 135.8 | 144.8 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# El Centro/Yuma ADI


IMPERIAL
YUMA
Hispanic Percentage of Total Population
□ ◉ 30% to 40%
▨ ◉ 41% to 50%
▥ ◉ 51% to 60%
⊠ ◉ 61% to 70%

## 2. Hispanic Population/Households - Total Population

Currently, there are an estimated 283,000 Hispanic households that comprise the El Centro/Yuma ADI. Imperial County accounts for 54% of the ADI's total household; Yuma County accounts for the remaining 46%.

### EL CENTRO/YUMA
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Yuma | AZ | 45.1 | 11.8 | 34.8% | 129.7 |
| Imperial | CA | 99.7 | 24.2 | 65.1 | 153.2 |
| TOTAL | | 144.8 | 36.0 | 51.2% | 282.9 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Typifying most of the other Hispanic ADIs, the El Centro/Yuma market is rather young. Hispanics under age 35 make up 72% of the market. Moreover, almost 38% of these are under 18 years of age.

Male Hispanics slightly outnumber females, with 33% of the total population; the latter constitute 29%.

### EL CENTRO/YUMA
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 11.0 | | 7.6% | |
| Males 25-34 | 16.7 | | 11.5 | |
| Males 35-49 | 12.1 | | 8.4 | |
| Males 50-54 | 2.0 | | 1.4 | |
| Males 55-64 | 4.1 | | 2.8 | |
| Males 65+ | 2.4 | | 1.7 | |
| **Males 18+** | | **48.3** | | **33.4%** |
| Females 18-24 | 8.4 | | 5.8 | |
| Females 25-34 | 13.4 | | 9.3 | |
| Females 35-49 | 11.7 | | 8.1 | |
| Females 50-54 | 1.8 | | 1.2 | |
| Females 55-64 | 3.8 | | 2.6 | |
| Females 65+ | 2.6 | | 1.8 | |
| **Females 18+** | | **41.7** | | **28.8** |
| **Teens (12-17)** | 18.2 | **18.2** | 12.5 | **12.5** |
| **Children (0-11)** | | **36.6** | | **25.3** |
| Children (2-11) | 30.4 | | 21.0 | |
| TOTAL 2+ | 138.6 | | 95.7% | |
| **TOTAL** | | **144.8** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 29

# WASHINGTON D.C.

*MARKET SIZE: 144,200 HISPANIC POPULATION*

## 1. Hispanic Population

The Washington D.C. ADI is unique in composition due to the fact that its counties span five different states. Counties from Maryland, Pennsylvania, Virginia, West Virginia and the District of Columbia all contribute to the market.

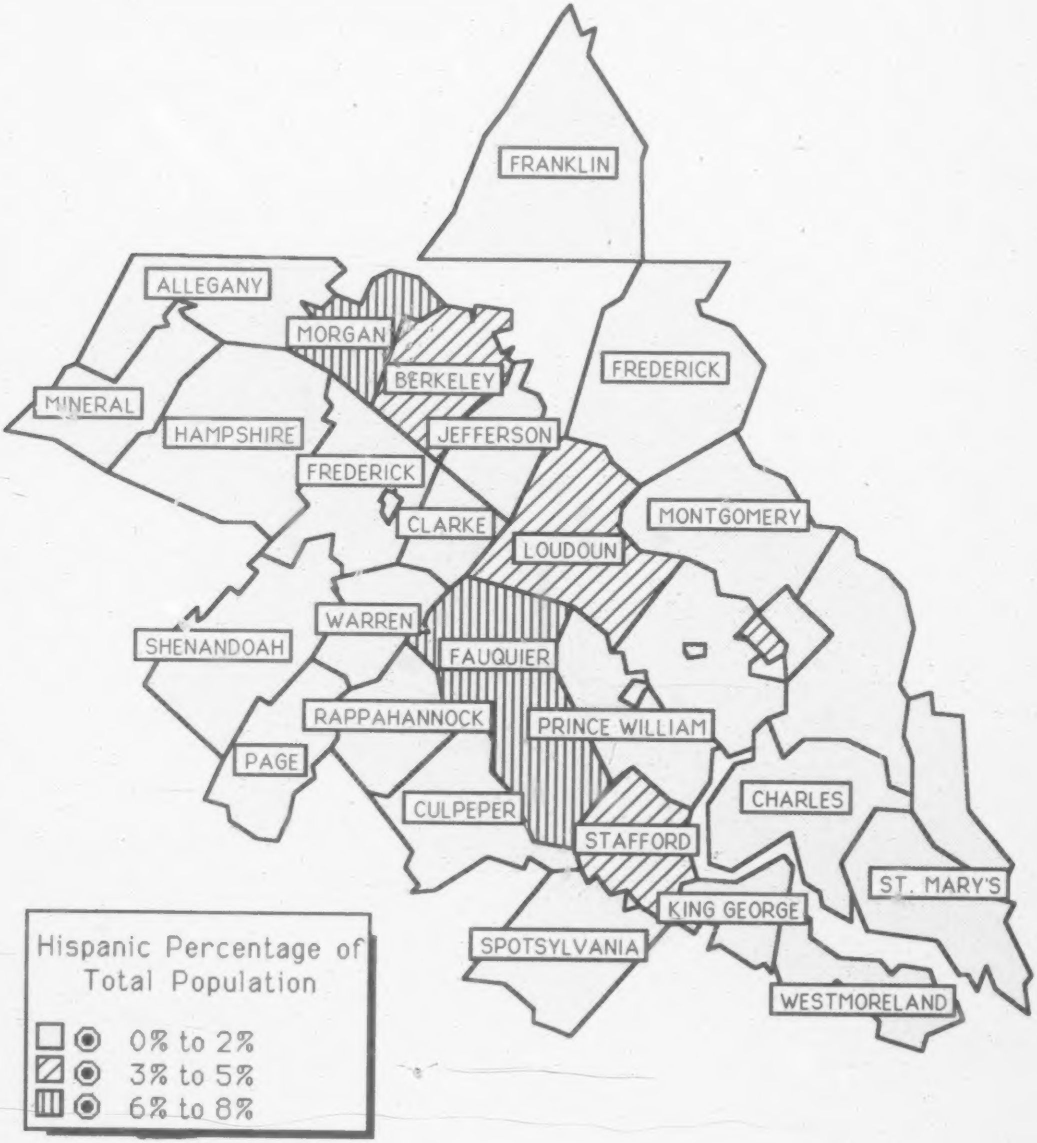
In 1985 the Hispanic population for this ADI was estimated at 111,300. In 1991, Hispanics number approximately 144,200, reflecting an increase of 30% during the 6-year period. Although there are 30 counties currently in the market, 78% of its total Hispanics are included among four counties: Montgomery, MD, Fairfax, VA, the District of Columbia, and Prince George.

### WASHINGTON, D.C.
### HISPANIC POPULATION
### 1980, 1985, 1989, 1991

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| District of Columbia | DC | 17.7 | 18.6 | 21.9 | 25.0 |
| Allegany | MD | 0.3 | 0.3 | 0.3 | 0.3 |
| Calvert | MD | 0.3 | 0.3 | 0.4 | 0.4 |
| Charles | MD | 0.9 | 1.1 | 1.4 | 1.6 |
| Frederick | MD | 0.8 | 1.0 | 1.2 | 1.4 |
| Montgomery | MD | 22.8 | 25.7 | 32.3 | 36.9 |
| Prince George's | MD | 14.4 | 15.0 | 17.6 | 18.1 |
| St. Mary's | MD | 0.8 | 0.9 | 1.1 | 1.1 |
| Washington | MD | 0.7 | 0.7 | NA | NA |
| Franklin | PA | 0.6 | 0.7 | 0.9 | 0.9 |

Continued. . .

# Washington D.C. ADI



FRANKLIN
ALLEGANY
MORGAN
BERKELEY
FREDERICK
MINERAL
HAMPSHIRE
JEFFERSON
FREDERICK
CLARKE
MONTGOMERY
LOUDOUN
WARREN
SHENANDOAH
FAUQUIER
RAPPAHANNOCK
PRINCE WILLIAM
PAGE
CHARLES
CULPEPER
STAFFORD
ST. MARY'S
KING GEORGE
SPOTSYLVANIA
WESTMORELAND
Hispanic Percentage of Total Population
☐ ◉ 0% to 2%
▨ ◉ 3% to 5%
▥ ◉ 6% to 8%

## WASHINGTON, D.C.
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991

(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Fulton | PA | * | NA | 0.1 | NA |
| Alexandria | VA | 4.0 | 4.3 | NA | NA |
| Arlington | VA | 8.9 | 10.2 | 12.3 | 13.3 |
| Clarke | VA | * | 0.1 | 0.1 | 0.1 |
| Culpeper | VA | 0.2 | 0.2 | 0.2 | 0.2 |
| Fairfax | VA | 19.5 | 22.9 | 28.8 | 33.1 |
| Fairfax City | VA | 0.4 | 0.5 | NA | NA |
| Falls Church | VA | 0.3 | 0.3 | NA | NA |
| Fauquier | VA | 0.1 | 0.3 | 0.4 | 0.4 |
| Frederick | VA | 0.1 | 0.1 | 0.2 | 0.3 |
| Fredericksburg | VA | 0.1 | 0.1 | NA | NA |
| King George | VA | 0.1 | 0.1 | 0.1 | 0.1 |
| Loudoun | VA | 0.8 | 1.1 | 1.4 | 1.6 |
| Madison | VA | 0.0 | NA | NA | NA |
| Manassas City | VA | 0.2 | 0.2 | NA | NA |
| Manassas Park | VA | * | 0.1 | NA | NA |
| Page | VA | 0.1 | 0.1 | 0.1 | 0.1 |
| Prince William | VA | 3.3 | 3.7 | 4.9 | 5.7 |
| Rappahannock | VA | 0.1 | 0.1 | 0.1 | 0.1 |
| Shenandoah | VA | 0.2 | 0.2 | 0.2 | 0.2 |
| Spotsylvania | VA | 0.3 | 0.4 | 0.9 | 0.9 |
| Stafford | VA | 0.5 | 0.6 | 0.7 | 0.8 |
| Warren | VA | 0.2 | 0.2 | 0.2 | 0.3 |
| Westmoreland | VA | 0.1 | 0.1 | 0.1 | 0.1 |
| Winchester | VA | 0.1 | 0.1 | NA | NA |

Continued. . .

## WASHINGTON, D.C.
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Berkeley | WV | 0.3 | 0.4 | 0.5 | 0.5 |
| Hampshire | WV | 0.1 | 0.1 | 0.1 | 0.1 |
| Hardy | WV | * | NA | 0.1 | NA |
| Jefferson | WV | 0.2 | 0.3 | 0.4 | 0.4 |
| Mineral | WV | 0.1 | 0.1 | 0.1 | 0.1 |
| Morgan | WV | * | 0.1 | 0.1 | 0.1 |
| TOTAL | | 99.6 | 111.3 | 129.2 | 144.2 |

NA = Not Applicable

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population.

An estimated 4.7 million people live in the Washington D.C. ADI. Of these, 3% or 144,200 are of Hispanic origin.

There are an estimated 46,600 Hispanic households in the Washington, D.C. market. Approximately 3.1 persons occupy the average Hispanic home. The bulk of Hispanic households (66%) are contained in three counties. These are: the District of Columbia (21%), Montgomery, MD (24%) and Fairfax, VA (32%).

### WASHINGTON, D.C.
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| District of Columbia | DC | 25.0 | 9.6 | 3.1% | 805.2 |
| Allegany | MD | 0.3 | 0.1 | 0.5 | 60.0 |
| Calvert | MD | 0.4 | 0.1 | 0.8 | 50.0 |
| Charles | MD | 1.6 | 0.4 | 1.4 | 111.4 |
| Frederick | MD | 1.4 | 0.4 | 7.0 | 19.3 |
| Montgomery | MD | 36.9 | 11.4 | 4.8 | 769.2 |
| Prince George's | MD | 18.1 | 5.8 | 2.4 | 753.3 |
| St. Mary's | MD | 1.1 | 0.3 | 1.4 | 78.6 |
| Franklin | PA | 0.9 | 0.3 | 0.6 | 150.0 |
| Fulton | PA | * | * | * | * |
| Arlington | VA | 13.3 | 5.0 | 6.5 | 204.8 |
| Clarke | VA | 0.1 | * | 0.4 | 25.0 |
| Culpeper | VA | 0.2 | 0.1 | 0.7 | 28.6 |
| Fairfax | VA | 33.1 | 9.9 | 3.9 | 848.0 |
| Fauquier | VA | 0.4 | 0.1 | 0.8 | 50.0 |
| Frederick | VA | 0.3 | 0.1 | 1.0 | 31.2 |

Continued...

## WASHINGTON, D.C.
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| King George | VA | 0.1 | * | 0.7 | 14.3 |
| Loudoun | VA | 1.6 | 0.4 | 1.7 | 91.8 |
| Page | VA | 0.1 | 0.0 | 0.6 | 16.7 |
| Prince William | VA | 5.7 | 1.5 | 2.6 | 218.1 |
| Rappahannock | VA | 0.1 | * | 0.9 | 11.1 |
| Shenandoah | VA | 0.2 | 0.1 | 0.7 | 28.6 |
| Spotsylvania | VA | 0.9 | 0.2 | 1.0 | 90.0 |
| Stafford | VA | 0.8 | 0.2 | 1.4 | 60.6 |
| Warren | VA | 0.3 | 0.1 | 1.0 | 32.4 |
| Westmoreland | VA | 0.1 | * | 0.8 | 12.5 |
| Berkeley | WV | 0.5 | 0.2 | 0.8 | 62.5 |
| Hampshire | WV | 0.1 | * | 0.5 | 20.0 |
| Hardy | WV | NA | NA | NA | NA |
| Jefferson | WV | 0.4 | 0.1 | 0.9 | 44.4 |
| Mineral | WV | 0.1 | * | 0.4 | 25.0 |
| Morgan | WV | 0.1 | * | 0.5 | 20.0 |
| TOTAL | | 144.2 | 46.6 | 3.0% | 4,732.4 |

* Designates a number less than 100.

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

An estimated 56% of the Washington ADI's Hispanic population is between the ages of 18 and 49. Teens between 12 and 17 years make up 11% of the Hispanic population, while Hispanic children under 12 represent 20% of the population, (almost double the teen percentage).

There is a slightly higher proportion of males over females in the Washington D.C. ADI.

### WASHINGTON, D.C.
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 11.5 | | 8.0% | |
| Males 25-34 | 17.0 | | 11.8 | |
| Males 35-49 | 12.6 | | 8.7 | |
| Males 50-54 | 2.2 | | 1.5 | |
| Males 55-64 | 4.4 | | 3.1 | |
| Males 65+ | 3.1 | | 2.1 | |
| **Males 18+** | | **50.8** | | **35.2%** |
| Females 18-24 | 10.5 | | 7.3 | |
| Females 25-34 | 15.7 | | 10.9 | |
| Females 35-49 | 12.8 | | 8.9 | |
| Females 50-54 | 2.3 | | 1.6 | |
| Females 55-64 | 4.4 | | 3.0 | |
| Females 65+ | 3.4 | | 2.4 | |
| **Females 18+** | | **49.1** | | **34.1** |
| **Teens (12-17)** | 15.4 | **15.4** | 10.7 | **10.7** |
| **Children (0-11)** | | **28.9** | | **20.0** |
| Children (2-11) | 24.4 | | 16.9 | |
| TOTAL 2+ | 139.7 | | 96.9% | |
| **TOTAL** | | **144.2** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 30

# SANTA BARBARA/SANTA MARIA/ SAN LUIS OBISPO

*MARKET SIZE: 124,800 HISPANIC POPULATION*

### 1. Hispanic Population

Located just north of Los Angeles, this southern California ADI is composed of two counties - San Luis Obispo and Santa Barbara. Presently, approximately 124,800 Hispanics reside there, which represents a 78% increase from the Hispanic population total of 1980.

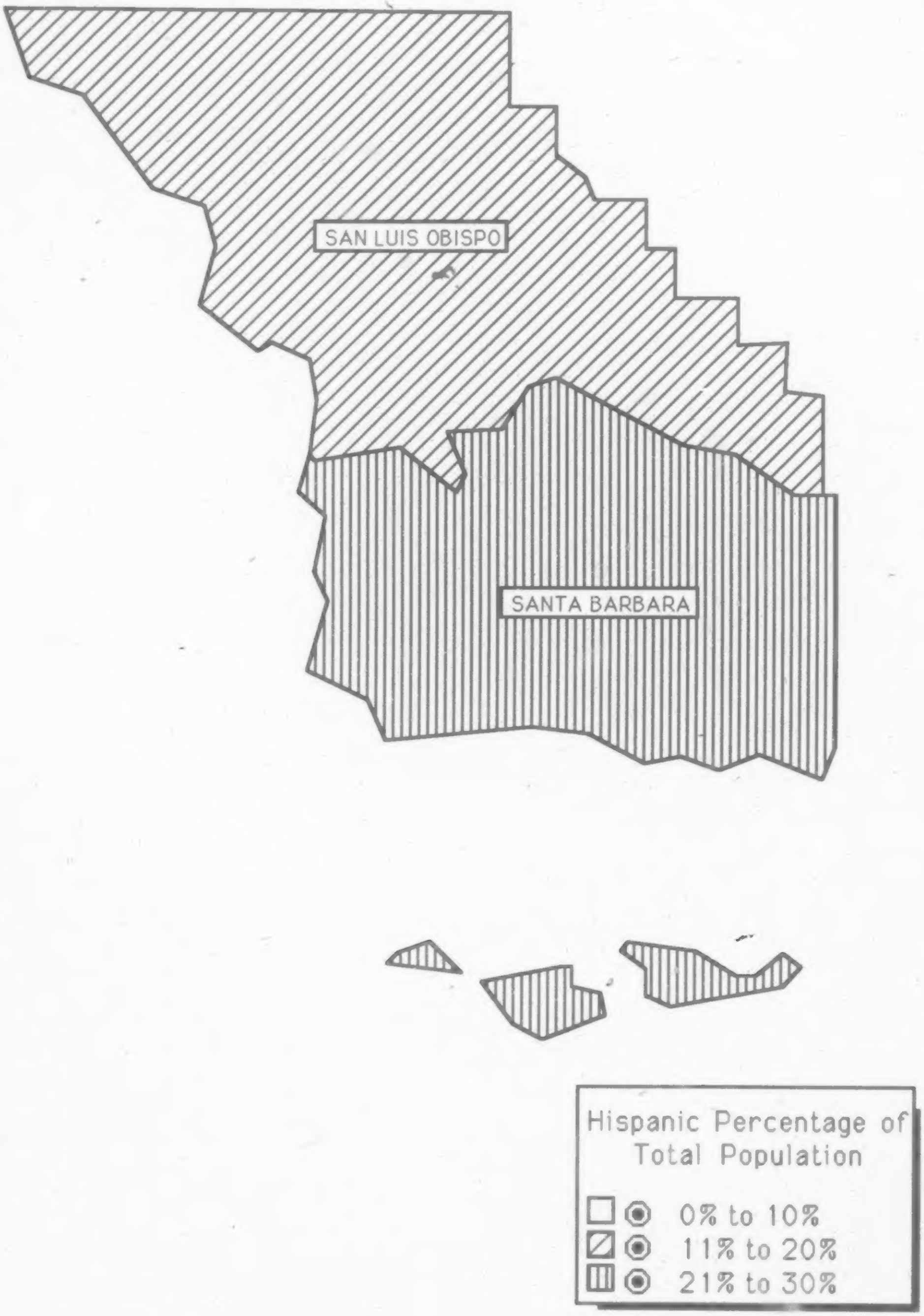
Approximately three fourths, or 95,000 of these Hispanics make their homes in Santa Barbara County, which has experienced a 71% growth in its Hispanic population since 1980. This represents 73% of the ADI's population growth during the 11 year period.

**SANTA BARBARA/SANTA MARIA/SAN LUIS OBISPO**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| San Luis Obispo | CA | 14.8 | 18.2 | 27.4 | 29.8 |
| Santa Barbara | CA | 55.4 | 65.2 | 87.2 | 95.0 |
| TOTAL | | 70.2 | 83.4 | 114.6 | 124.8 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## Santa Barbara / Santa Maria / San Luis Obispo ADI


SAN LUIS OBISPO
SANTA BARBARA
Hispanic Percentage of Total Population
☐ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%

## 2. Hispanic Population/Households - Total Population

Approximately 20% of the Santa Barbara/Santa Maria/San Luis Obispo ADI is comprised of Hispanics. Its estimated total population of 638,500 consists of 124,800 Hispanics.

Santa Barbara County has the larger percentage of Hispanics between the two counties, with approximately 24% of its residents being Hispanic, compared with 12% for San Luis Obispo County.

Although 76% of the ADI's Hispanic population lives in Santa Barbara County, the county itself is only 24% Hispanic, based on a Hispanic population of 95,000 and an estimated total 1991 population of 394,100.

### SANTA BARBARA/SANTA MARIA/SAN LUIS OBISPO HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| San Luis Obispo | CA | 29.8 | 8.0 | 12.2% | 244.4 |
| Santa Barbara | CA | 95.0 | 27.2 | 24.1 | 394.1 |
| TOTAL | | 124.8 | 35.2 | 19.5% | 638.5 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

There are slightly more males than females among the Santa Barbara/Santa Maria/San Luis Obispo ADI's Hispanic population.

Children under twelve represent one-fifth (21%) of the market's Hispanic population, while an additional 12% are between twelve and seventeen years of age.

### SANTA BARBARA/SANTA MARIA/SAN LUIS OBISPO HISPANIC AGE/SEX DISTRIBUTION

### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 10.1 | | 8.1% | |
| Males 25-34 | 14.5 | | 11.6 | |
| Males 35-49 | 10.0 | | 8.0 | |
| Males 50-54 | 2.1 | | 1.7 | |
| Males 55-64 | 4.2 | | 3.4 | |
| Males 65+ | 2.9 | | 2.3 | |
| **Males 18+** | | **43.8** | | **35.1%** |
| Females 18-24 | 8.0 | | 6.4 | |
| Females 25-34 | 11.9 | | 9.5 | |
| Females 35-49 | 9.6 | | 7.7 | |
| Females 50-54 | 2.2 | | 1.8 | |
| Females 55-64 | 4.4 | | 3.5 | |
| Females 65+ | 3.5 | | 2.8 | |
| **Females 18+** | | **39.6** | | **31.7** |
| **Teens (12-17)** | 15.3 | **15.3** | 12.3 | **12.3** |
| **Children (0-11)** | | **26.1** | | **20.9** |
| Children (2-11) | 21.7 | | 17.4 | |
| TOTAL 2+ | 120.4 | | 96.5% | |
| **TOTAL** | | **124.8** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 31

# COLORADO SPRINGS/PUEBLO

*MARKET SIZE: 120,500 HISPANIC POPULATION*

### 1. Hispanic Population

The Colorado Springs/Pueblo, Colorado ADI presently contains approximately 120,500 Hispanics, a 33% increase over the number of Hispanics living there in 1980, a numerical gain of 26,900.

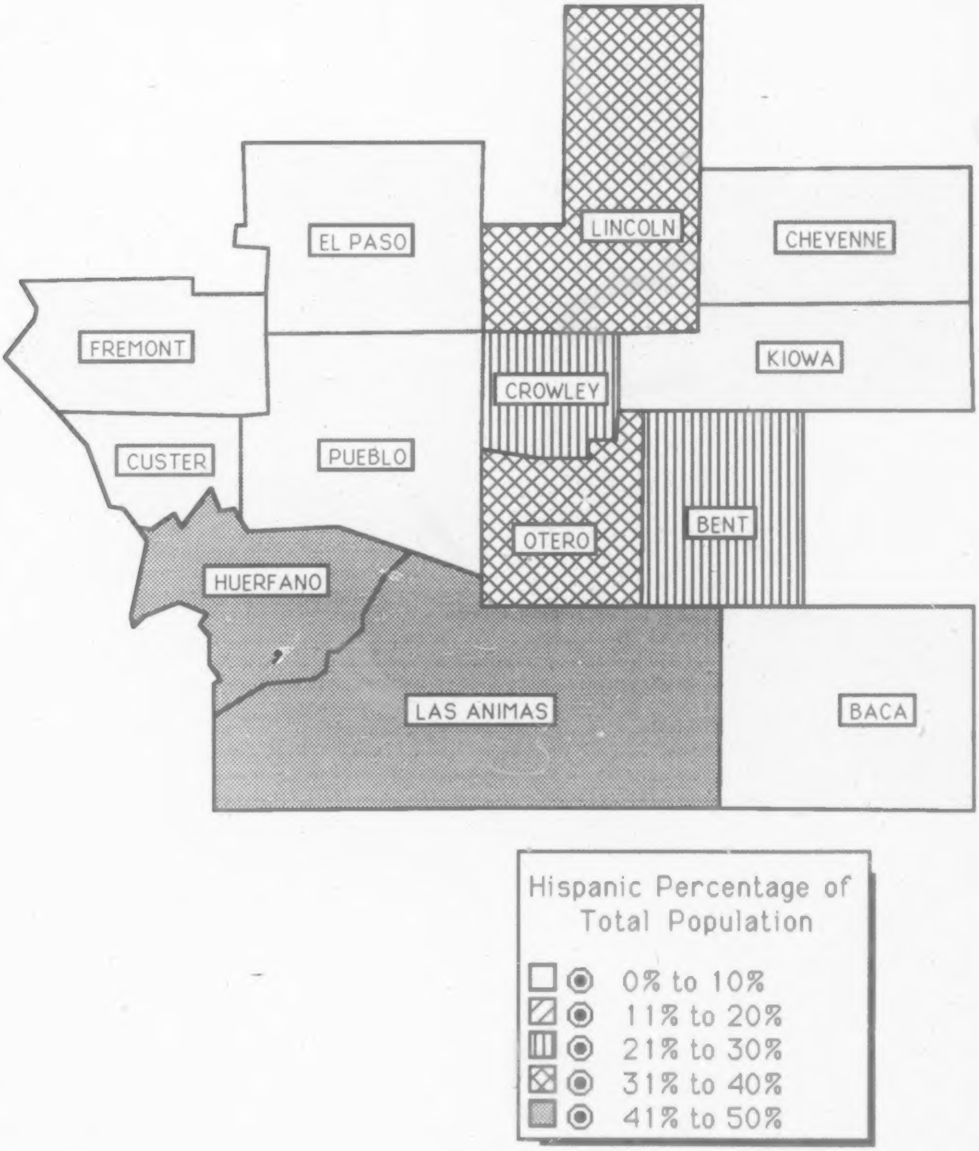
El Paso and Pueblo Counties, combined, contain 78% of the total Hispanic population in the ADI. El Paso County has experienced the largest percentage increase in Hispanic population since 1980, with 58% more Hispanics living there compared with eleven years ago. Pueblo County's Hispanic population growth during this same period was 31%.

**COLORADO SPRINGS/PUEBLO**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Baca | CO | 0.3 | 0.4 | 0.5 | 0.7 |
| Bent | CO | 1.5 | 1.6 | 1.8 | 2.0 |
| Cheyenne | CO | 0.1 | 0.1 | 0.1 | 0.1 |
| Crowley | CO | 0.6 | 0.6 | 0.6 | 0.7 |
| Custer | CO | * | * | 0.1 | 0.1 |
| El Paso | CO | 25.0 | 27.6 | 34.0 | 39.4 |
| Fremont | CO | 2.3 | 2.5 | 2.9 | 3.4 |
| Hinsdale | CO | * | NA | NA | NA |
| Huerfano | CO | 2.8 | 2.9 | 3.1 | 3.4 |
| Kiowa | CO | * | * | * | * |

Continued...

# Colorado Springs ADI


LINCOLN
EL PASO
CHEYENNE
FREMONT
CROWLEY
KIOWA
CUSTER
PUEBLO
BENT
OTERO
HUERFANO
LAS ANIMAS
BACA
Hispanic Percentage of Total Population
☐ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%
▩ ◉ 31% to 40%
▦ ◉ 41% to 50%

## COLORADO SPRINGS/PUEBLO
## HISPANIC POPULATION
## 1980, 1985, 1989, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Las Animas | CO | 6.5 | 6.7 | 6.9 | 7.4 |
| Lincoln | CO | * | NA | NA | 0.1 |
| Mineral | CO | * | NA | NA | NA |
| Otero | CO | 7.5 | 7.6 | 7.9 | 8.7 |
| Prowers | CO | 2.6 | NA | NA | NA |
| Pueblo | CO | 41.6 | 43.9 | 48.8 | 54.5 |
| Saguache | CO | NA | 1.6 | NA | NA |
| Teller | CO | 0.1 | NA | NA | NA |
| TOTAL | | 90.9 | 95.5 | 106.7 | 120.5 |

NA = Not Applicable

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

A total of approximately 730,700 persons reside within the Colorado Springs/Pueblo ADI, of which 120,500 are Hispanic, providing the ADI a 16% Hispanic composition.

The average household size among Hispanics is 3.1 persons.

### COLORADO SPRINGS/PUEBLO
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Baca | CO | 0.7 | 0.2 | 6.5% | 10.1 |
| Bent | CO | 2.0 | 0.6 | 26.5 | 7.6 |
| Cheyenne | CO | 0.1 | * | 2.4 | 4.2 |
| Crowley | CO | 0.7 | 0.2 | 21.3 | 3.5 |
| Custer | CO | 0.1 | * | 3.7 | 2.7 |
| El Paso | CO | 39.4 | 12.1 | 8.8 | 447.9 |
| Fremont | CO | 3.4 | 0.8 | 8.8 | 38.7 |
| Huerfano | CO | 3.4 | 1.2 | 44.5 | 7.6 |
| Kiowa | CO | * | * | * | 2.0 |
| Las Animas | CO | 7.4 | 2.8 | 44.0 | 16.9 |
| Otereo | CO | 8.7 | 2.7 | 35.1 | 24.9 |
| Lincoln | CO | 0.1 | * | 1.1 | 9.4 |
| Pueblo | CO | 54.5 | 18.0 | 35.1 | 155.2 |
| TOTAL | | 120.5 | 38.7 | 16.5% | 730.7 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex of the Population

The Hispanic population of the Colorado Springs ADI is a relatively young one, as 40% of the population is under the age of 18, and 71% is 34 years of age or younger.

**COLORADO SPRINGS/PUEBLO**
**HISPANIC AGE/SEX DISTRIBUTION**
**1991**

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 8.2 | | 6.8% | |
| Males 25-34 | 12.2 | | 10.1 | |
| Males 35-49 | 8.9 | | 7.4 | |
| Males 50-54 | 1.8 | | 1.5 | |
| Males 55-64 | 3.4 | | 2.8 | |
| Males 65+ | 2.8 | | 2.3 | |
| **Males 18+** | | **37.3** | | **30.9%** |
| Females 18-24 | 7.2 | | 6.0 | |
| Females 25-34 | 10.0 | | 8.3 | |
| Females 35-49 | 9.3 | | 7.7 | |
| Females 50-54 | 1.9 | | 1.6 | |
| Females 55-64 | 3.8 | | 3.1 | |
| Females 65+ | 3.2 | | 2.7 | |
| **Females 18+** | | **35.4** | | **29.4** |
| **Teens (12-17)** | 17.3 | **17.3** | 14.4 | **14.4** |
| **Children (0-11)** | | **30.5** | | **25.3** |
| Children (2-11) | 26.1 | | 21.6 | |
| TOTAL 2+ | 116.1 | | 96.3% | |
| **TOTAL** | | **120.5** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 32

# HARTFORD / NEW HAVEN

*MARKET SIZE: 114,300 HISPANIC POPULATION*

### 1. Hispanic Population

The Hartford/New Haven ADI is composed of seven counties: Hartford, Litchfield, Middlesex, New Haven, New London, Tolland, and Windham. The Hispanic population is estimated at 114,300, an increase of 48% from 1980 in central Connecticut.

The largest segment of the ADI's Hispanics reside in Hartford County. Specifically, some 60,100 Hispanics make their homes in Hartford, while an additional 39,500 live in New Haven. Combined, these two counties represent 87% of the ADI's total Hispanic population.

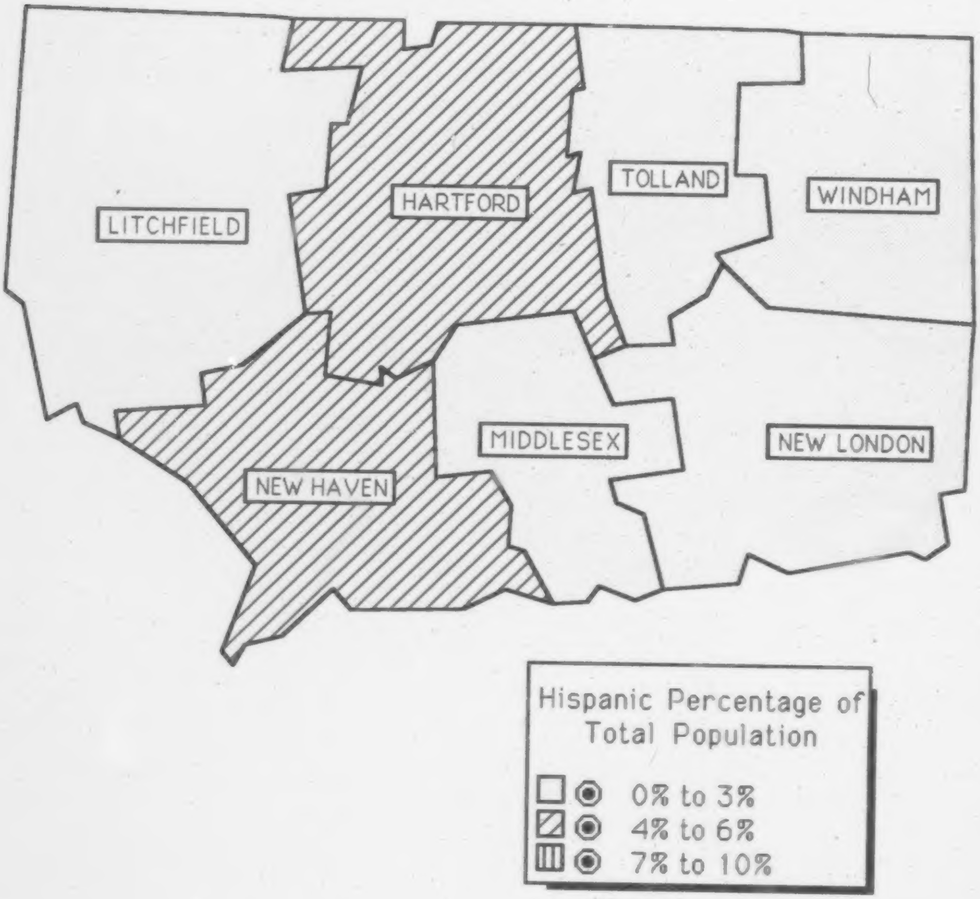
**HARTFORD/NEW HAVEN**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Hartford | CT | 41.4 | 49.2 | 54.4 | 60.1 |
| Litchfield | CT | 1.1 | 1.2 | 1.4 | 1.5 |
| Middlesex | CT | 1.8 | 2.1 | 2.3 | 2.5 |
| New Haven | CT | 27.3 | 31.7 | 36.3 | 39.5 |
| New London | CT | 4.7 | 5.3 | 5.7 | 6.3 |
| Tolland | CT | 1.0 | 1.1 | 1.3 | 1.4 |
| Windham | CT | NA | NA | 2.6 | 3.0 |
| TOTAL | | 77.3 | 90.6 | 104.0 | 114.3 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Hartford / New Haven ADI


LITCHFIELD
HARTFORD
TOLLAND
WINDHAM
MIDDLESEX
NEW LONDON
NEW HAVEN
Hispanic Percentage of Total Population
□ ◉ 0% to 3%
▨ ◉ 4% to 6%
▥ ◉ 7% to 10%

## 2. Hispanic Population/Households - Total Population

Approximately 4% of the Hartford/New Haven ADI population is Hispanic. While 53% of the ADI's Hispanic population is concentrated in Hartford County, Hispanics comprise only 6% of the County's total population.

Current estimates suggest there are 34,400 households in the Hartford/New Haven ADI which are headed by persons of Hispanic descent. The greatest proportion are concentrated in Hartford County (18,200 households), followed by New Haven (12,000 households).

Overall, there are an average of 3.3 members per Hispanic household in this northeastern ADI.

### HARTFORD/NEW HAVEN
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Hartford | CT | 60.1 | 18.2 | 6.1% | 985.6 |
| Litchfield | CT | 1.5 | 0.4 | 0.8 | 196.0 |
| Middlesex | CT | 2.5 | 0.7 | 1.6 | 157.5 |
| New Haven | CT | 39.5 | 12.0 | 4.5 | 876.9 |
| New London | CT | 6.3 | 1.9 | 2.3 | 271.9 |
| Tolland | CT | 1.4 | 0.3 | 1.0 | 137.8 |
| Windham | CT | 3.0 | 0.9 | 2.6 | 115.2 |
| TOTAL | | 114.3 | 34.4 | 4.2% | 2,740.9 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

There are slightly more adult Hispanic females than males in the Hartford New Haven ADI. Adult females account for 33% of the Hispanic population, while adult males represent 30% of the total.

Over 73% of the Hispanic residents in the ADI are under the age of 35, with 37% under the age of 18.

### HARTFORD/NEW HAVEN
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 8.4 | | 7.4% | |
| Males 25-34 | 11.7 | | 10.2 | |
| Males 35-49 | 8.8 | | 7.7 | |
| Males 50-54 | 1.2 | | 1.0 | |
| Males 55-64 | 2.4 | | 2.1 | |
| Males 65+ | 1.8 | | 1.6 | |
| **Males 18+** | | **34.3** | | **30.0%** |
| Females 18-24 | 8.5 | | 7.4 | |
| Females 25-34 | 12.1 | | 10.6 | |
| Females 35-49 | 9.7 | | 8.5 | |
| Females 50-54 | 1.6 | | 1.4 | |
| Females 55-64 | 3.1 | | 2.7 | |
| Females 65+ | 2.4 | | 2.1 | |
| **Females 18+** | | **37.4** | | **32.7** |
| **Teens (12-17)** | 13.5 | **13.5** | 11.8 | **11.8** |
| **Children (0-11)** | | **29.1** | | **25.5** |
| Children (2-11) | 25.0 | | 21.9 | |
| TOTAL 2+ | 110.2 | | 96.4% | |
| **TOTAL** | | **114.3** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 33

# SALT LAKE CITY

*MARKET SIZE:96,500 HISPANIC POPULATION*

## 1. Hispanic Population

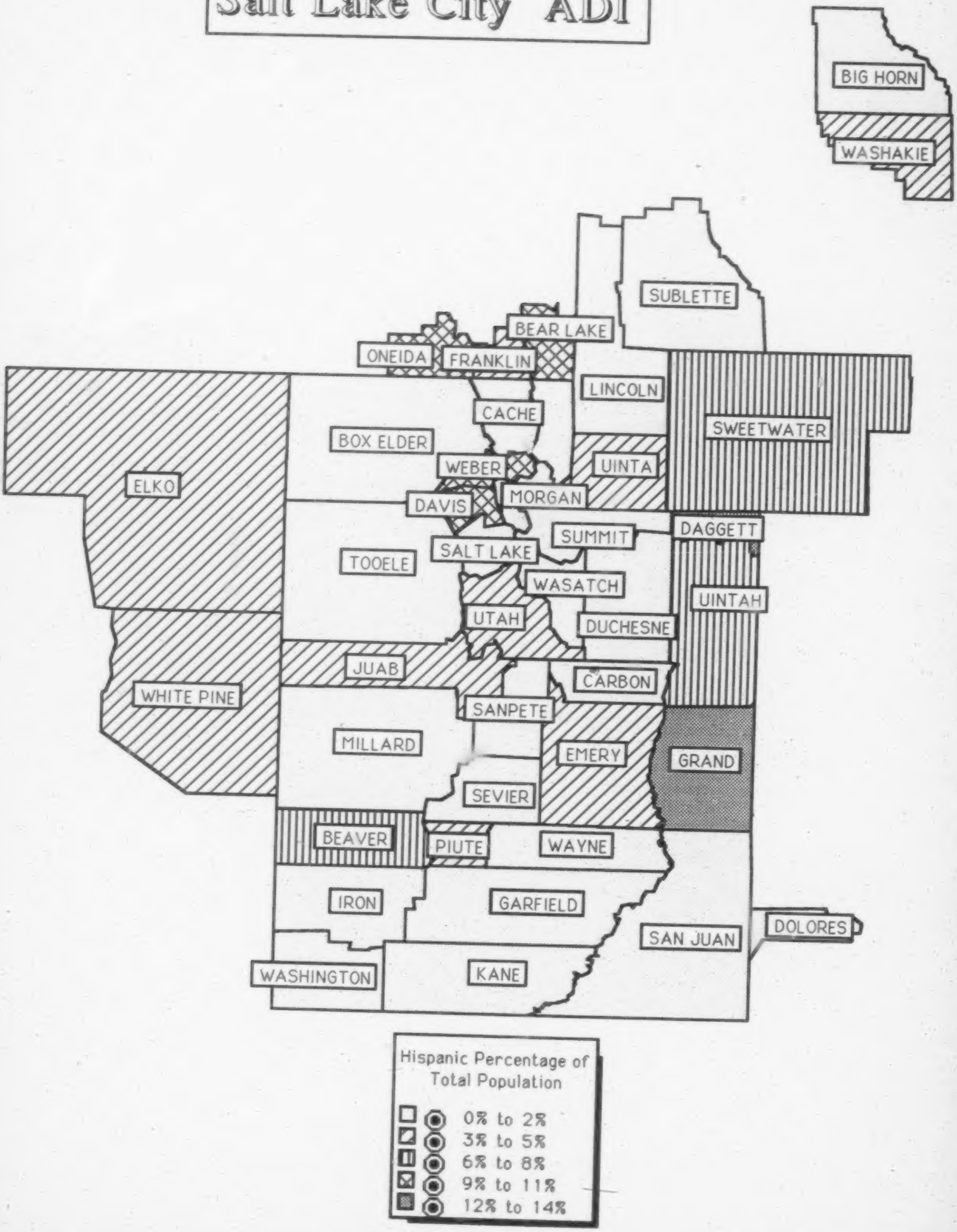
Composed of counties from four Midwestern states, the Salt Lake City ADI has a Hispanic population of 96,500 persons, an increase of 13% from the number of Hispanics living there in 1980. Salt Lake County, contains 45% of the ADI's Hispanic population, a total of 43,500 persons.

### SALT LAKE CITY
### HISPANIC POPULATION
### 1980, 1991

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Dolores | CO | * | 0.1 |
| Bear Lake | ID | * | 0.1 |
| Franklin | ID | * | 0.2 |
| Onieda | ID | * | * |
| Elko | CT | 2.6 | 3.3 |
| White Pine | CT | 0.7 | 0.8 |
| Beaver | UT | * | 0.1 |
| Box Elder | UT | 1.6 | 1.8 |
| Cache | UT | 0.7 | 0.9 |
| Carbon | UT | 2.9 | 3.1 |
| Daggett | UT | * | * |
| Davis | UT | 7.9 | 8.5 |
| Duchesne | UT | 0.2 | 0.3 |
| Emery | UT | 0.2 | 0.3 |
| Garfield | UT | * | * |
| Grand | UT | 0.3 | 0.4 |
| Summit | UT | 0.2 | 0.4 |

Continued . . .

# Salt Lake City ADI


BIG HORN
WASHAKIE
SUBLETTE
BEAR LAKE
ONEIDA
FRANKLIN
LINCOLN
CACHE
BOX ELDER
SWEETWATER
WEBER
UINTA
ELKO
DAVIS
MORGAN
DAGGETT
SUMMIT
SALT LAKE
TOOELE
WASATCH
UINTAH
UTAH
DUCHESNE
JUAB
CARBON
WHITE PINE
SANPETE
MILLARD
EMERY
GRAND
SEVIER
BEAVER
PIUTE
WAYNE
IRON
GARFIELD
DOLORES
SAN JUAN
WASHINGTON
KANE
Hispanic Percentage of Total Population
0% to 2%
3% to 5%
6% to 8%
9% to 11%
12% to 14%

# SALT LAKE CITY
# HISPANIC POPULATION
# 1980, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Iron | UT | 0.2 | 0.4 |
| Juab | UT | * | 0.1 |
| Kane | UT | * | 0.1 |
| Millard | UT | 0.2 | 0.3 |
| Morgan | UT | * | 0.1 |
| Piute | UT | * | * |
| Rich | UT | * | * |
| Salt Lake | UT | 39.8 | 43.5 |
| San Juan | UT | 0.4 | 0.5 |
| Sanpete | UT | 0.3 | 0.4 |
| Sevier | UT | 0.1 | 0.3 |
| Summit | UT | 0.2 | 0.4 |
| Tooele | UT | 2.9 | 3.3 |
| Uintah | UT | 0.6 | 0.8 |
| Utah | UT | 6.5 | 6.9 |
| Wasatch | UT | 0.1 | 0.2 |
| Washington | UT | 0.5 | 0.7 |
| Wayne | UT | * | * |
| Weber | UT | 10.9 | 11.5 |
| Big Horn | WY | 0.7 | 0.6 |
| Lincoln | WY | 0.3 | 0.4 |
| Sublette | WY | * | 0.1 |
| Sweetwater | WY | 3.8 | 4.1 |
| Uinta | WY | 0.4 | 0.8 |
| Washakie | WY | 0.8 | 0.9 |
| TOTAL | | 85.8 | 96.5 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

Approximately 5% of the Salt Lake City ADI's population is estimated to be Hispanic, or 96,500 of the ADI's estimated 1991 total population of 2.0 million. Only two other counties in the ADI contain as many as one thousand households.

Salt Lake County contains 42% of the market's total number of Hispanic households. The average household size among Hispanics is 3.5 persons.

### SALT LAKE CITY
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Dolores | CO | 0.1 | * | 5.9% | 1.7 |
| Bear Lake | ID | 0.1 | * | 1.6 | 6.2 |
| Franklin | ID | 0.2 | * | 1.9 | 10.8 |
| Oneida | ID | * | * | * | 3.5 |
| Elko | NV | 3.3 | 1.2 | 12.4 | 26.3 |
| White Pine | NV | 0.8 | 0.3 | 10.1 | 8.1 |
| Beaver | UT | 0.1 | * | 2.1 | 4.9 |
| Box Elder | UT | 1.8 | 0.4 | 4.4 | 41.7 |
| Cache | UT | 0.9 | 0.2 | 1.3 | 70.7 |
| Carbon | UT | 3.1 | 0.9 | 11.8 | 25.9 |
| Daggett | UT | * | * | * | 0.8 |
| Davis | UT | 8.5 | 2.0 | 4.2 | 201.0 |
| Duchesne | UT | 0.3 | 0.1 | 1.6 | 19.6 |
| Emery | UT | 0.3 | 0.1 | 2.3 | 13.6 |
| Garfield | UT | * | * | * | 4.0 |
| Grand | UT | 0.4 | 0.1 | 4.9 | 8.3 |

Continued...

## SALT LAKE CITY
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Iron | UT | 0.4 | 0.1 | 1.6 | 24.9 |
| Juab | UT | 0.1 | * | 1.2 | 8.5 |
| Kane | UT | 0.1 | * | 1.3 | 7.9 |
| Millard | UT | 0.3 | 0.1 | 2.0 | 15.5 |
| Morgan | UT | 0.1 | * | 1.2 | 8.5 |
| Piute | UT | * | * | * | 1.5 |
| Rich | UT | * | * | * | 2.4 |
| Salt Lake | UT | 43.5 | 12.8 | 5.7 | 763.7 |
| San Juan | UT | 0.5 | 0.1 | 4.1 | 12.4 |
| Sanpete | UT | 0.4 | 0.1 | 2.2 | 18.6 |
| Sevier | UT | 0.3 | 0.1 | 1.4 | 21.1 |
| Summit | UT | 0.4 | 0.1 | 2.4 | 17.0 |

Continued. . .

## SALT LAKE CITY
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Tooele | UT | 3.3 | 0.9 | 10.4% | 31.4 |
| Uintah | CT | 0.8 | 0.2 | 3.0 | 27.3 |
| Utah | CT | 6.9 | 1.5 | 2.6 | 266.2 |
| Wasatch | CT | 0.2 | * | 1.7 | 12.1 |
| Washington | CT | 0.7 | 0.1 | 1.4 | 50.3 |
| Wayne | CT | * | * | * | 2.3 |
| Weber | UT | 11.5 | 3.4 | 6.8 | 168.5 |
| Big Horn | WY | 0.6 | 0.1 | 4.5 | 13.7 |
| Lincoln | WY | 0.4 | 0.1 | 2.7 | 15.0 |
| Sublette | WY | 0.1 | * | 1.4 | 7.1 |
| Sweetwater | WY | 4.1 | 1.3 | 8.8 | 46.4 |
| Uinta | WY | 0.8 | 0.2 | 3.4 | 23.7 |
| Washakie | WY | 0.9 | 0.3 | 9.1 | 10.1 |
| TOTAL | | 96.5 | 27.2 | 4.7% | 2,023.2 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Approximately 73% of the Salt Lake City ADI Hispanic population is under 35 years of age; 42% are under 18 years.

There is a slightly higher proportion of adult males than adult females among the market's Hispanic population. Specifically, adult Hispanic males comprise 31% of the population, while adult Hispanic females account for under 28% of the total Hispanic population base. Children account for over 41% of the ADI's 1991 population.

### SALT LAKE CITY
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 6.6 | | 6.8% | |
| Males 25-34 | 9.4 | | 9.7 | |
| Males 35-49 | 8.2 | | 8.5 | |
| Males 50-54 | 1.6 | | 1.7 | |
| Males 55-64 | 2.0 | | 2.1 | |
| Males 65+ | 2.1 | | 2.2 | |
| **Males 18+** | | **29.9** | | **31.0%** |
| Females 18-24 | 6.0 | | 6.2 | |
| Females 25-34 | 8.6 | | 8.9 | |
| Females 35-49 | 6.8 | | 7.1 | |
| Females 50-54 | 1.2 | | 1.2 | |
| Females 55-64 | 2.2 | | 2.3 | |
| Females 65+ | 1.7 | | 1.8 | |
| **Females 18+** | | **26.5** | | **27.5** |
| **Teens (12-17)** | 11.9 | **11.9** | 12.3 | **12.3** |
| **Children (0-11)** | | **28.2** | | **29.2** |
| Children (2-11) | 24.2 | | 25.1 | |
| TOTAL 2+ | 92.5 | | 95.9% | |
| **TOTAL** | | **96.5** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 34

# DETROIT

*MARKET SIZE: 95,300 HISPANIC POPULATION*

### 1. Hispanic Population

The 1991 estimate of Hispanic population for the Detroit ADI is 95,300 people. Well over half (58%) live in Wayne County, and an additional 19,600 live in Oakland County. Combined, these two counties comprise 78% of the Detroit market's Hispanic population.

Since 1980, this ADI has increased its Hispanic population by 23%, a gain of 17,800 persons.

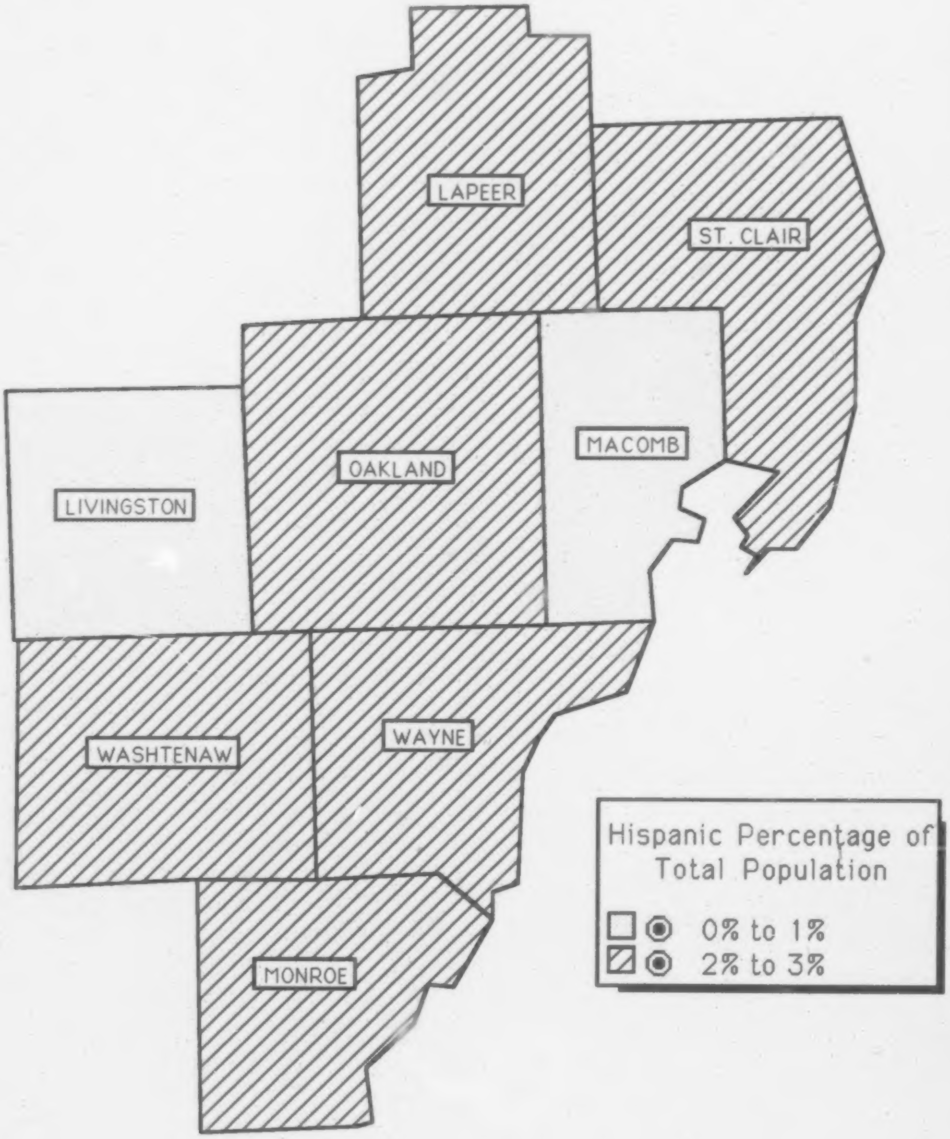
**DETROIT**
**HISPANIC POPULATION**
**1980, 1985, 1989, 1991**

| County | State | 1980 Hispanic Population (000) | 1985 Hispanic Population (000) | 1989 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|---|---|
| Lapeer | MI | 1.3 | 1.5 | 1.7 | 1.8 |
| Livingston | MI | 0.8 | 0.9 | 1.1 | 1.2 |
| Macomb | MI | 6.6 | 7.1 | 8.1 | 8.7 |
| Monroe | MI | 1.8 | 1.9 | 2.2 | 2.5 |
| Oakland | MI | 14.5 | 16.2 | 18.1 | 19.6 |
| Sanilac | MI | NA | 0.9 | 2.8 | NA |
| St. Clair | MI | 2.1 | 2.5 | 1.0 | 1.0 |
| Washtenaw | MI | 4.1 | 4.7 | 5.1 | 5.3 |
| Wayne | MI | 46.3 | 48.4 | 54.0 | 55.2 |
| TOTAL | | 77.5 | 84.1 | 94.1 | 95.3 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Detroit ADI


LAPEER
ST. CLAIR
OAKLAND
MACOMB
LIVINGSTON
WASHTENAW
WAYNE
MONROE
Hispanic Percentage of Total Population
☐ ◉ 0% to 1%
▨ ◉ 2% to 3%

## 2. Hispanic Population/Households - Total Population

With an estimated Hispanic population of 95,300 and a total population of approximately 5.2 million, the Detroit ADI is 2% Hispanic.

There are currently 30,200 households headed by persons of Hispanic origin or descent in the market, and 60% (18,000) are situated in Wayne County.

On average, there are 3.2 members per Hispanic household in the Detroit ADI.

### DETROIT
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Lapeer | MI | 1.8 | 0.4 | 2.2% | 81.1 |
| Livingston | MI | 1.2 | 0.3 | 0.9 | 128.3 |
| Macomb | MI | 8.7 | 2.6 | 1.1 | 791.9 |
| Monroe | MI | 2.5 | 0.7 | 1.6 | 157.5 |
| Oakland | MI | 19.6 | 6.0 | 1.7 | 1,153.4 |
| Sanilac | MI | NA | NA | NA | NA |
| St. Clair | MI | 1.0 | 0.5 | 2.4 | 42.3 |
| Washtenaw | MI | 5.3 | 1.7 | 1.7 | 321.5 |
| Wayne | MI | 55.2 | 18.0 | 2.2 | 2,509.1 |
| TOTAL | | 95.3 | 30.2 | 1.8% | 5,185.1 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The Detroit market is also a relatively young one. Approximately 37% of the Hispanic population is under 18 years of age, while 35% of the population is between the ages of 18 and 34. Thus, 72% are under 35 years of age. Conversely, persons 55 and over represent only some 9% of the ADI's Hispanic population.

### DETROIT
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 7.2 | | 7.5% | |
| Males 25-34 | 10.2 | | 10.7 | |
| Males 35-49 | 7.9 | | 8.3 | |
| Males 50-54 | 1.2 | | 1.3 | |
| Males 55-64 | 2.4 | | 2.5 | |
| Males 65+ | 1.8 | | 1.9 | |
| **Males 18+** | | **30.7** | | **32.2%** |
| Females 18-24 | 6.6 | | 6.9 | |
| Females 25-34 | 9.3 | | 9.7 | |
| Females 35-49 | 7.9 | | 8.3 | |
| Females 50-54 | 1.2 | | 1.3 | |
| Females 55-64 | 2.2 | | 2.3 | |
| Females 65+ | 1.8 | | 1.9 | |
| **Females 18+** | | **29.0** | | **30.4** |
| **Teens (12-17)** | 11.5 | **11.5** | 12.1 | **12.1** |
| **Children (0-11)** | | **24.1** | | **25.3** |
| Children (2-11) | 20.3 | | 21.3 | |
| TOTAL 2+ | 91.5 | | 96.0% | |
| **TOTAL** | | **95.3** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 35

# SEATTLE/TACOMA

*MARKET SIZE: 90,100 HISPANIC POPULATION*

### 1. Hispanic Population

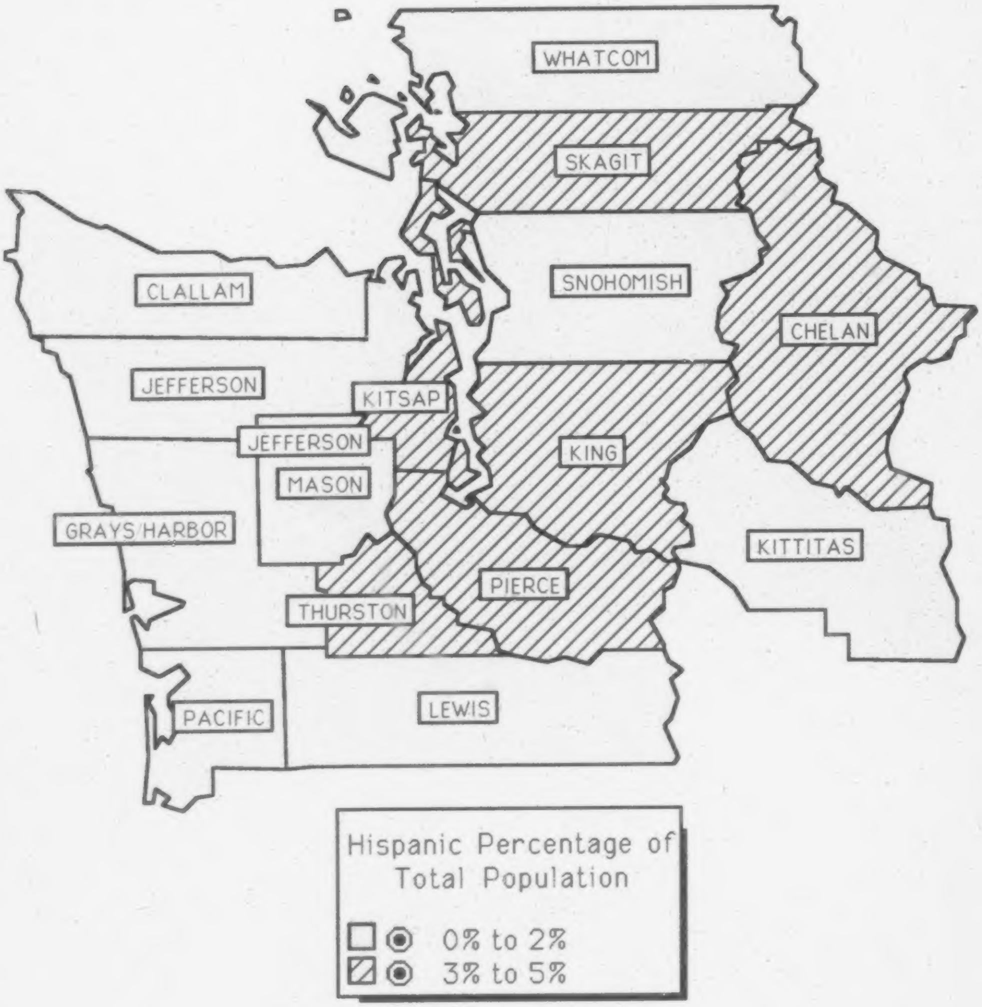
The Seattle/Tacoma ADI contains a Hispanic population of approximately 90,100, of which the largest percentage live in two counties - King and Pierce. Specifically, King County is home to 37,900 Hispanics while Pierce County has 19,400 Hispanics. Together, both counties represent 64% of this ADI's Hispanic population.

**SEATTLE/TACOMA**
**HISPANIC POPULATION**
**1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Chelan | WA | 1.5 | 1.9 |
| Clallam | WA | 0.7 | 0.9 |
| Grays Harbor | WA | 0.8 | 1.1 |
| Island | WA | 1.3 | 1.8 |
| Jefferson | WA | 0.2 | 0.3 |
| King | WA | 28.6 | 37.9 |
| Kitsap | WA | 4.3 | 6.0 |
| Kittitas West | WA | 0.3 | 0.4 |

1Continued...

# Seattle/Tacoma ADI


WHATCOM
SKAGIT
CLALLAM
SNOHOMISH
CHELAN
JEFFERSON
KITSAP
JEFFERSON
KING
MASON
GRAYS HARBOR
KITTITAS
PIERCE
THURSTON
PACIFIC
LEWIS
Hispanic Percentage of Total Population
☐ ◉ 0% to 2%
▨ ◉ 3% to 5%

# SEATTLE/TACOMA
# HISPANIC POPULATION
## 1980, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Lewis | WA | 0.7 | 0.9 |
| Mason | WA | 0.5 | 0.6 |
| Pacific | WA | 0.1 | 0.2 |
| Pierce | WA | 14.1 | 19.4 |
| San Juan | WA | 0.0 | 0.1 |
| Skagit | WA | 2.2 | 2.9 |
| Snohomish | WA | 6.3 | 8.6 |
| Thurston | WA | 3.0 | 4.2 |
| Whatcom | WA | 2.2 | 2.9 |
| TOTAL | | 66.8 | 90.1 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

With a total population of 3.4 million, and a Hispanic population of 90,100, the Seattle/Tacoma ADI is 3% Hispanic.

Overall, this ADI has very low Hispanic population density, with the highest proportion of Hispanics to total population occurring in Skagit County, where only 4% of the county's residents are Hispanic.

### SEATTLE/TACOMA
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Chelan | WA | 1.9 | 0.7 | 3.7% | 51.4 |
| Clallam | WA | 0.9 | 0.3 | 1.6 | 56.3 |
| Grays Harbor | WA | 1.1 | 0.3 | 1.7 | 64.7 |
| Island | WA | 1.8 | 0.5 | 3.2 | 56.3 |
| Jefferson | WA | 0.3 | 0.1 | 1.5 | 20.0 |
| King | WA | 37.9 | 12.6 | 2.6 | 1457.7 |
| Kitsap | WA | 6.0 | 1.5 | 3.1 | 194.1 |
| Kittitas West | WA | 0.4 | 0.1 | 1.6 | 25.0 |
| Lewis | WA | 0.9 | 0.3 | 1.5 | 60.0 |
| Mason | WA | 0.6 | 0.1 | 1.6 | 37.5 |
| Pacific | WA | 0.2 | 0.1 | 1.1 | 18.2 |
| Pierce | WA | 19.4 | 5.6 | 3.2 | 605.1 |
| San Juan | WA | 0.1 | * | 0.8 | 12.5 |
| Skagit | WA | 2.9 | 0.8 | 3.8 | 75.2 |
| Snohomish | WA | 8.6 | 2.5 | 2.0 | 429.3 |
| Thurston | WA | 4.2 | 1.3 | 2.6 | 163.2 |
| Whatcom | WA | 2.9 | 0.9 | 2.4 | 122.0 |
| TOTAL | | 90.1 | 27.7 | 2.6% | 3,448.5 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Approximately 37% of the Seattle/Tacoma ADI's Hispanic population is under 18 years of age, and another 36% is between the ages of 18 and 34.

There are slightly more adult Hispanic males than females, with the former outnumbering the latter by 4%. Overall, just over one third of the ADI's Hispanic population are adult males and just under 30% are adult females.

### SEATTLE/TACOMA
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 7.5 | | 8.3% | |
| Males 25-34 | 9.8 | | 10.9 | |
| Males 35-49 | 8.1 | | 9.0 | |
| Males 50-54 | 0.8 | | 0.9 | |
| Males 55-64 | 2.5 | | 2.8 | |
| Males 65+ | 1.4 | | 1.5 | |
| **Males 18+** | | **30.1** | | **33.4%** |
| Females 18-24 | 6.1 | | 6.8 | |
| Females 25-34 | 8.6 | | 9.5 | |
| Females 35-49 | 6.9 | | 7.7 | |
| Females 50-54 | 1.4 | | 1.5 | |
| Females 55-64 | 2.3 | | 2.6 | |
| Females 65+ | 1.4 | | 1.5 | |
| **Females 18+** | | **26.7** | | **29.6** |
| **Teens (12-17)** | 10.1 | **10.1** | 11.2 | **11.2** |
| **Children (0-11)** | | **23.2** | | **25.8** |
| Children (2-11) | 19.2 | | 21.3 | |
| TOTAL 2+ | 86.1 | | 95.5% | |
| **TOTAL** | | **90.1** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 36

# WACO/TEMPLE

*MARKET SIZE:87,100 HISPANIC POPULATION*

### 1. Hispanic Population

Thirteen counties comprise the Waco/Temple ADI. The estimated 1991 Hispanic population of the Waco/Temple ADI is 87,100.

Three-fourths of the market's Hispanics live in three counties - Bell, McLennan, and Brazos. The largest proportion (30%, or 26,200 Hispanics) live in Bell County.

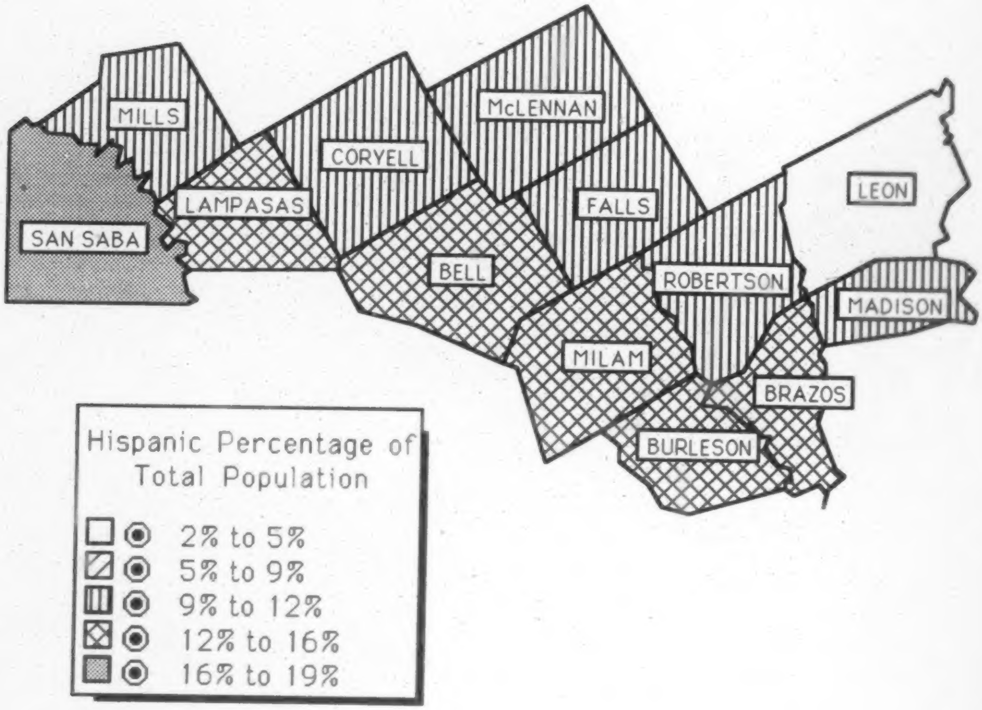
**WACO/TEMPLE**
**HISPANIC POPULATION**
**1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Bell | TX | 17.4 | 26.2 |
| Brazos | TX | 9.5 | 17.1 |
| Burleson | TX | 1.3 | 2.0 |
| Coryell | TX | 4.7 | 7.1 |
| Falls | TX | 1.7 | 2.1 |
| Lampasas | TX | 1.3 | 2.1 |
| Leon | TX | NA | 0.2 |
| Madison | TX | 0.8 | 1.2 |
| McLennan | TX | 15.0 | 22.3 |
| Milam | TX | 2.4 | 3.3 |
| Mills | TX | NA | 0.4 |
| Robertson | TX | NA | 1.9 |
| San Saba | TX | 0.1 | 1.2 |
| TOTAL | | 54.2 | 87.1 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Waco/Temple ADI


MILLS
McLENNAN
CORYELL
LEON
LAMPASAS
FALLS
SAN SABA
BELL
ROBERTSON
MADISON
MILAM
BRAZOS
BURLESON
Hispanic Percentage of Total Population
2% to 5%
5% to 9%
9% to 12%
12% to 16%
16% to 19%

## 2. Hispanic Population/Households - Total Population

Based on a Hispanic population of 87,100 and a total population base of 723,000, the Waco/Temple ADI is 12% Hispanic.

Bell County is both the most heavily Hispanic county in terms of absolute numbers as well as having the highest population density of Hispanic persons. Specifically, (13%), 26,200 of the 197,100 residents of Bell County are of Hispanic origin/descent.

There are an estimated 23,900 households headed by Hispanics in the Waco/Temple ADI, resulting in an average household size of 3.6 persons.

### WACO/TEMPLE
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Bell | TX | 26.2 | 7.7 | 13.3 | 197.1 |
| Brazos | TX | 17.1 | 5.0 | 12.8 | 133.9 |
| Burleson | TX | 2.0 | 0.5 | 12.8 | 15.6 |
| Coryell | TX | 7.1 | 1.4 | 10.3 | 68.6 |
| Falls | TX | 2.1 | 0.6 | 11.6 | 18.3 |
| Lampasas | TX | 2.1 | 0.6 | 13.3 | 16.1 |
| Leon | TX | 0.2 | 0.1 | 2.1 | 9.8 |
| Madison | TX | 1.2 | 0.1 | 9.5 | 13.0 |
| McLennan | TX | 22.3 | 6.2 | 11.3 | 197.6 |
| Milam | TX | 3.3 | 0.8 | 13.1 | 25.4 |
| Mills | TX | 0.4 | 0.1 | 8.6 | 4.7 |
| Robertson | TX | 1.9 | 0.5 | 11.7 | 16.4 |
| San Saba | TX | 1.2 | 0.3 | 18.5 | 6.5 |
| TOTAL | | 87.1 | 23.9 | 12.1% | 723.0 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

### 3. Age/Sex Of The Population

Typical of so many of the Hispanic markets, the Waco/Temple ADI is a fairly young market; 74% of the Hispanic population is under 34 years of age, and only 4% of the area's Hispanics are of retirement age (65+).

Among the adult Hispanic population 18 years and older, there is a gender skew towards males, who comprise 35% of the Hispanic population while females constitute only 28% of the total.

**WACO/TEMPLE**
**HISPANIC AGE/SEX DISTRIBUTION**
**1991**

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 10.5 | | 12.1% | |
| Males 25-34 | 8.8 | | 10.1 | |
| Males 35-49 | 6.2 | | 7.1 | |
| Males 50-54 | 1.2 | | 1.4 | |
| Males 55-64 | 2.0 | | 2.3 | |
| Males 65+ | 1.6 | | 1.8 | |
| **Males 18+** | | **30.3** | | **34.8%** |
| Females 18-24 | 6.3 | | 7.2 | |
| Females 25-34 | 7.0 | | 8.0 | |
| Females 35-49 | 6.6 | | 7.6 | |
| Females 50-54 | 1.0 | | 1.2 | |
| Females 55-64 | 1.8 | | 2.1 | |
| Females 65+ | 2.0 | | 2.3 | |
| **Females 18+** | | **24.7** | | **28.4** |
| **Teens (12-17)** | 8.9 | **8.9** | 10.2 | **10.2** |
| **Children (0-11)** | | **23.2** | | **26.6** |
| Children (2-11) | 18.9 | | 21.7 | |
| TOTAL 2+ | 82.8 | | 95.1% | |
| **TOTAL** | | **87.1** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 37

# AMARILLO

*MARKET SIZE: 86,800 HISPANIC POPULATION*

### 1. Hispanic Population

The Amarillo ADI is composed of thirty-one counties, mostly in Texas, and it includes a few counties each, in the adjacent states of Oklahoma, and New Mexico. The ADI's estimated 1991 population is 86,800 Hispanic residents, which representing a 130% increase from eleven years ago when only 37,700 Hispanic persons lived in the market.

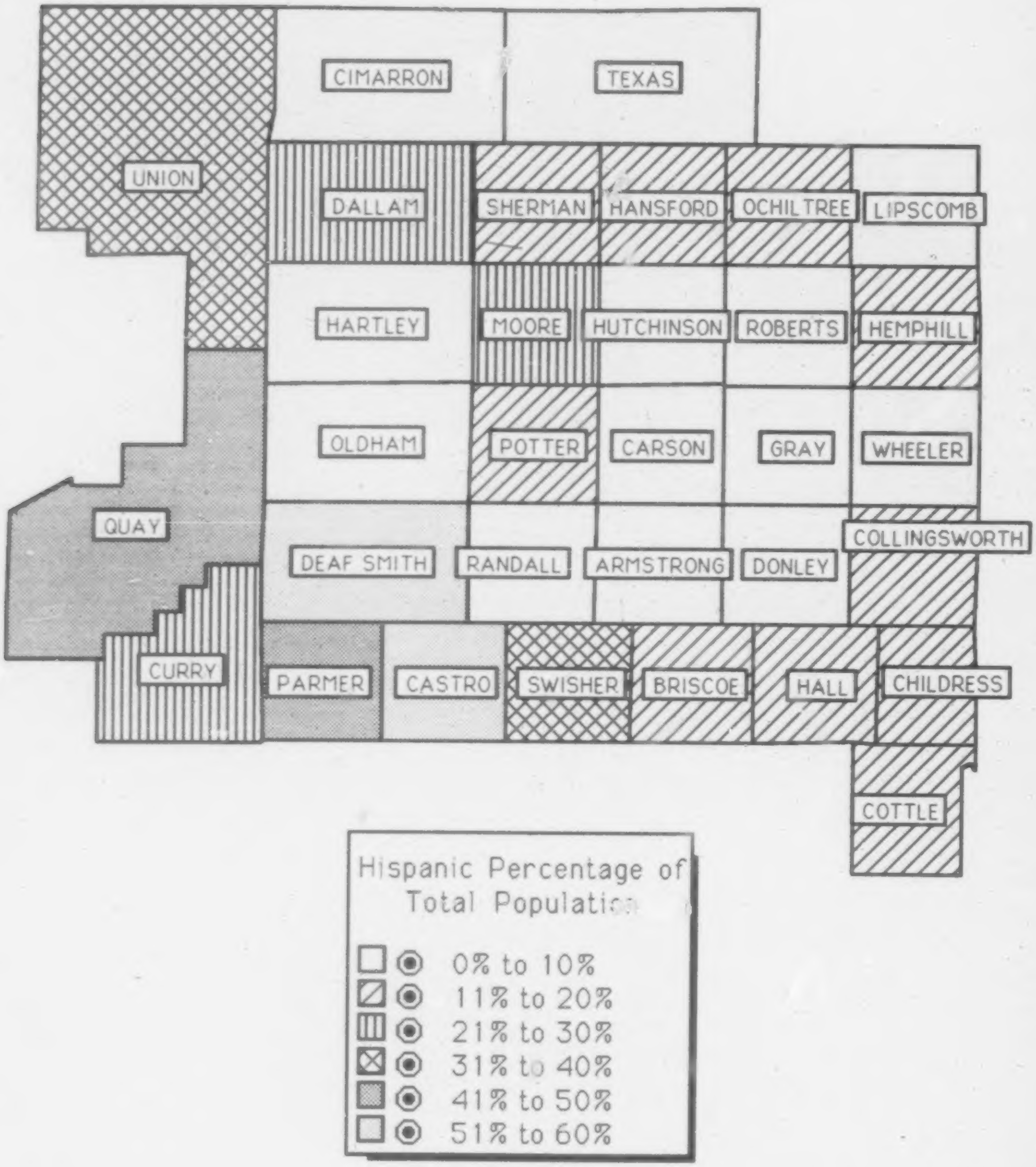
Approximately 18% (15,900 persons) of the total ADI's Hispanic population make their residence in Potter County, with another 12% residing in each of Curry and Deaf Smith Counties.

**AMARILLO
HISPANIC POPULATION
1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Curry | NM | NA | 11.0 |
| Quay | NM | NA | 5.1 |
| Union | NM | NA | 1.9 |
| Cimarron | OK | NA | 0.4 |
| Texas | OK | NA | 1.6 |
| Armstrong | TX | 0.1 | 0.1 |
| Briscoe | TX | 0.4 | 0.4 |
| Carson | TX | 0.3 | 0.4 |
| Castro | TX | 4.1 | 5.3 |
| Childress | TX | 0.7 | 0.9 |
| Collingsworth | TX | 0.6 | 0.7 |
| Cottle | TX | 0.4 | 0.4 |
| Dallam | TX | 1.1 | 1.5 |
| Deaf Smith | TX | 8.6 | 11.1 |
| Donley | TX | 0.2 | 0.2 |

Continued...

# Amarillo ADI


CIMARRON
TEXAS
UNION
DALLAM
SHERMAN
HANSFORD
OCHILTREE
LIPSCOMB
HARTLEY
MOORE
HUTCHINSON
ROBERTS
HEMPHILL
OLDHAM
POTTER
CARSON
GRAY
WHEELER
QUAY
DEAF SMITH
RANDALL
ARMSTRONG
DONLEY
COLLINGSWORTH
CURRY
PARMER
CASTRO
SWISHER
BRISCOE
HALL
CHILDRESS
COTTLE
Hispanic Percentage of
Total Population
0% to 10%
11% to 20%
21% to 30%
31% to 40%
41% to 50%
51% to 60%

## AMARILLO
## HISPANIC POPULATION
## 1980-1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Gray | TX | 1.2 | 1.6 |
| Hall | TX | 0.8 | 1.0 |
| Hansford | TX | 0.7 | 1.1 |
| Hartley | TX | 0.2 | 0.3 |
| Hemphill | TX | 0.5 | 0.7 |
| Hutchinson | TX | 1.3 | 1.9 |
| Lipscomb | TX | 0.3 | 0.4 |
| Moore | TX | 3.3 | 4.8 |
| Ochiltree | TX | 0.9 | 1.3 |
| Oldham | TX | 0.1 | 1.2 |
| Parmer | TX | 3.6 | 5.0 |
| Potter | TX | 11.5 | 17.3 |
| Randall | TX | 3.4 | 5.8 |
| Sherman | TX | 0.4 | 0.4 |
| Swisher | TX | 2.7 | 3.6 |
| Wheeler | TX | 0.3 | 0.4 |
| TOTAL | | 37.7 | 86.8 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

With a total population of over one-half a million (506,900) people and a Hispanic population of 86,800, the Amarillo ADI is 17% Hispanic.

Deaf Smith County, the ADI's second most populated Hispanic county in terms of absolute numbers, has the highest density of Hispanics, with 53% of its residents being of Hispanic origin/descent.

### AMARILLO
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Curry | NM | 11.0 | 3.1 | 23.8% | 46.3 |
| Quay | NM | 5.1 | 1.7 | 42.4 | 12.0 |
| Union | OK | 1.9 | 0.6 | 36.5 | 5.3 |
| Cimarron | OK | 0.4 | 0.1 | 10.0 | 4.0 |
| Texas | TX | 1.6 | 0.4 | 8.8 | 18.7 |
| Armstrong | TX | 0.1 | 0.0 | 4.5 | 2.3 |
| Briscoe | TX | 0.4 | 0.1 | 19.0 | 2.1 |
| Carson | TX | 0.4 | 0.1 | 5.6 | 7.3 |
| Castro | TX | 5.3 | 1.3 | 51.0 | 10.3 |
| Childress | TX | 0.9 | 0.2 | 13.6 | 6.8 |
| Collingsworth | TX | 0.7 | 0.2 | 15.9 | 4.5 |
| Cottle | TX | 0.4 | 0.1 | 16.7 | 2.4 |
| Dallam | TX | 1.5 | 0.4 | 21.7 | 7.1 |
| Deaf Smith | TX | 11.1 | 2.8 | 52.9 | 21.0 |
| Donley | TX | 0.2 | 0.1 | 4.5 | 4.5 |
| Gray | TX | 1.6 | 0.5 | 6.1 | 26.8 |

Continued...

## AMARILLO
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Hall | TX | 1.0 | 0.2 | 19.2 | 5.3 |
| Hansford | TX | 1.1 | 0.3 | 15.9 | 6.9 |
| Hartley | TX | 0.3 | 0.1 | 6.5 | 4.7 |
| Hemphill | TX | 0.7 | 0.2 | 12.1 | 5.9 |
| Hutchinson | TX | 1.9 | 0.5 | 6.3 | 29.4 |
| Lipscomb | TX | 0.4 | 0.1 | 9.3 | 4.4 |
| Moore | TX | 4.8 | 1.2 | 26.2 | 18.5 |
| Ochiltree | TX | 1.3 | 0.3 | 12.9 | 10.4 |
| Oldham | TX | 0.2 | * | 8.0 | 2.6 |
| Parmer | TX | 5.0 | 1.1 | 43.0 | 11.7 |
| Potter | TX | 17.3 | 4.9 | 16.0 | 107.9 |
| Randall | TX | 5.8 | 1.6 | 5.9 | 97.6 |
| Roberts | TX | * | * | 2.8 | 0.0 |
| Sherman | TX | 0.4 | 0.1 | 13.3 | 3.1 |
| Swisher | TX | 3.6 | 0.8 | 36.8 | 9.7 |
| Wheeler | TX | 0.4 | 0.1 | 5.1 | 8.1 |
| TOTAL | | 86.8 | 23.2 | 17.1% | 506.9 |

*Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The Amarillo ADI is a very young market, as almost one third of its Hispanic population is under 12 years of age, and 44% are under 18 years of age.

Amarillo's gender composition is approximately equal, as 28% of the adult Hispanic population are males and 27% are females.

### AMARILLO
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 5.3 | | 6.1% | |
| Males 25-34 | 7.9 | | 9.1 | |
| Males 35-49 | 7.2 | | 8.3 | |
| Males 50-54 | 0.8 | | 0.9 | |
| Males 55-64 | 1.9 | | 2.2 | |
| Males 65+ | 1.4 | | 1.6 | |
| **Males 18+** | | **24.5** | | **28.2%** |
| Females 18-24 | 5.3 | | 6.1 | |
| Females 25-34 | 7.3 | | 8.4 | |
| Females 35-49 | 6.6 | | 7.6 | |
| Females 50-54 | 1.4 | | 1.6 | |
| Females 55-64 | 1.7 | | 2.0 | |
| Females 65+ | 1.5 | | 1.7 | |
| **Females 18+** | | **23.8** | | **27.4** |
| **Teens (12-17)** | 11.6 | **11.6** | 13.4 | **13.4** |
| **Children (0-11)** | | **26.9** | | **31.0** |
| Children (2-11) | 22.9 | | 26.4 | |
| TOTAL 2+ | 82.8 | | 95.4% | |
| **TOTAL** | | **86.8** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 38

# PORTLAND

*MARKET SIZE:79,500 HISPANIC POPULATION*

### 1. Hispanic Population

The Portland ADI, covering parts of Washington State as well as adjoining Oregon, currently has an estimated Hispanic population of 79,500.

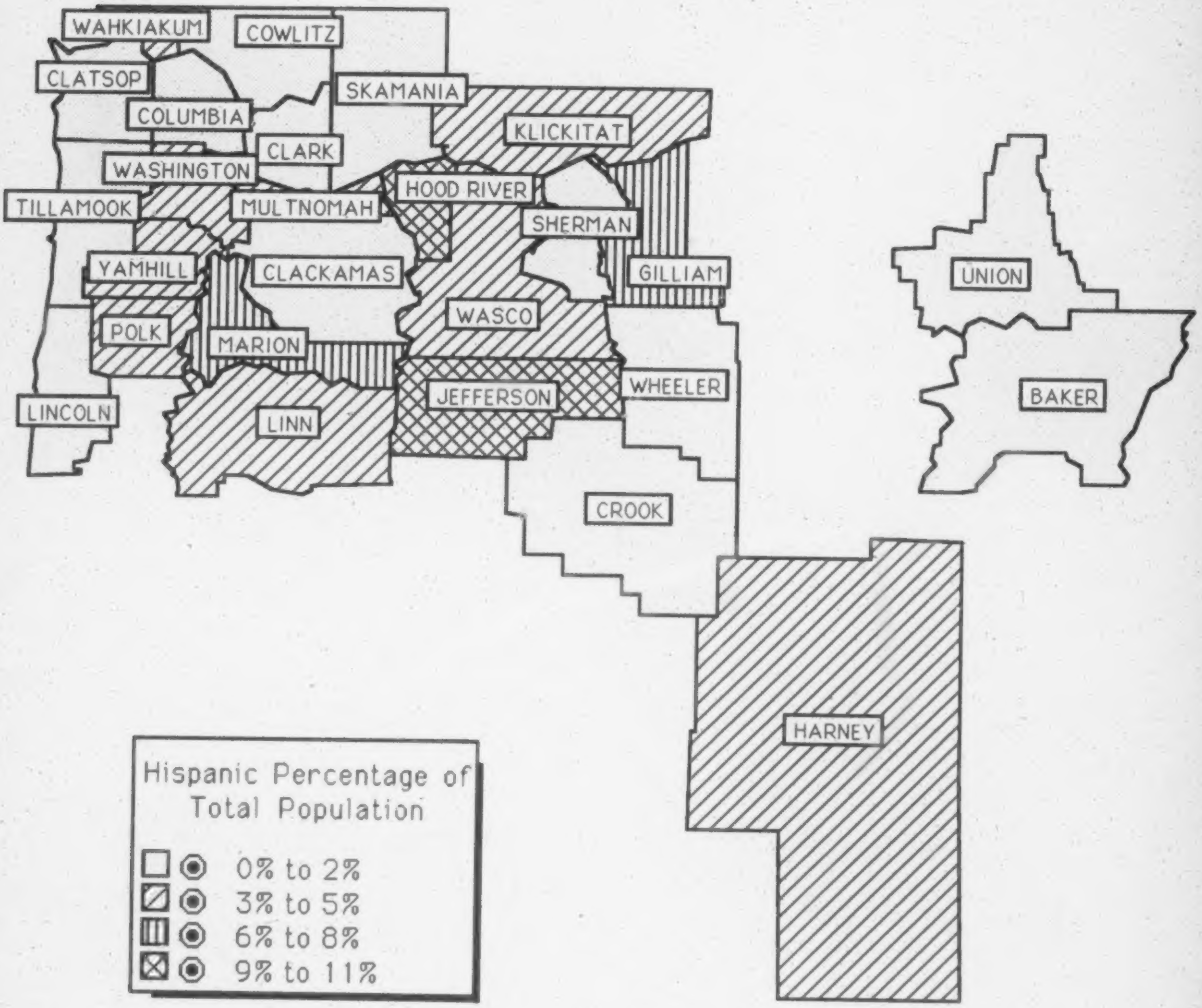
Multnomah and Marion Counties have the highest number of Hispanic residents, and together they account for 45% of the entire ADI's Hispanic population.

**PORTLAND**
**HISPANIC POPULATION**
**1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Baker | OR | 0.2 | 0.3 |
| Clackamas | OR | 1.4 | 6.5 |
| Clatsop | OR | 0.2 | 0.8 |
| Columbia | OR | 0.4 | 0.8 |
| Crook | OR | 0.2 | 0.3 |
| Gilliam | OR | * | 0.1 |
| Harney | OR | 0.1 | 0.4 |
| Hood River | OR | 1.0 | 1.7 |
| Jefferson | OR | 0.2 | 1.4 |
| Lincoln | OR | 0.2 | 0.7 |
| Linn | OR | 0.6 | 2.8 |
| Marion | OR | 10.4 | 17.1 |

Continued...

# Portland ADI


WAHKIAKUM
COWLITZ
CLATSOP
SKAMANIA
COLUMBIA
KLICKITAT
CLARK
WASHINGTON
HOOD RIVER
TILLAMOOK
MULTNOMAH
SHERMAN
YAMHILL
CLACKAMAS
GILLIAM
UNION
WASCO
POLK
MARION
WHEELER
JEFFERSON
BAKER
LINCOLN
LINN
CROOK
HARNEY
Hispanic Percentage of Total Population
☐ ◉ 0% to 2%
▨ ◉ 3% to 5%
▥ ◉ 6% to 8%
☒ ◉ 9% to 11%

## PORTLAND
## HISPANIC POPULATION
## 1980, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Multnomah | OR | 17.2 | 18.6 |
| Polk | OR | 2.3 | 2.7 |
| Sherman | OR | NA | * |
| Tillamook | OR | 0.2 | 0.3 |
| Union | OR | 0.1 | 0.5 |
| Wasco | OR | 0.7 | 0.8 |
| Washington | OR | 12.1 | 12.4 |
| Wheeler | OR | * | * |
| Yamhill | OR | 1.5 | 3.2 |
| Clark | WA | NA | 5.3 |
| Cowlitz | WA | NA | 1.7 |
| Klickitat | WA | NA | 0.8 |
| Skamania | WA | NA | 0.2 |
| Wahkiakum | WA | * | 0.1 |
| TOTAL | | 49.0 | 79.5 |

NA = Not Applicable

*Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

With a total population of 2.2 million and a Hispanic population of 79,500, the Portland ADI is close to 4% Hispanic.

Jefferson County contains the highest percentage of Hispanics to total population (11%), followed by Hood River County which is 10% Hispanic. And although Hispanics represent only 3% of Multnomah County's population, this county is home to almost 19,000 Hispanics.

Hispanic households in the Portland ADI total 23,400. In this regard, there is an average of 3.4 members per Hispanic household in this ADI.

### PORTLAND
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Baker | OR | 0.3 | 0.1 | 1.9% | 15.8 |
| Clackamas | OR | 6.5 | 1.8 | 2.3 | 281.0 |
| Clatsop | OR | 0.8 | 0.2 | 2.2 | 37.3 |
| Columbia | OR | 0.8 | 0.2 | 2.1 | 39.1 |
| Crook | OR | 0.3 | 0.1 | 2.1 | 14.4 |
| Gilliam | OR | 0.1 | * | 5.6 | 1.8 |
| Harney | OR | 0.4 | 0.1 | 5.1 | 8.1 |
| Hood River | OR | 1.7 | 0.8 | 10.2 | 17.0 |
| Jefferson | OR | 1.4 | 0.3 | 10.8 | 13.3 |
| Lincoln | OR | 0.7 | 0.2 | 1.9 | 38.4 |
| Linn | OR | 2.8 | 0.8 | 3.0 | 92.5 |
| Marion | OR | 17.1 | 4.5 | 7.4 | 230.4 |
| Multnomah | OR | 18.6 | 6.4 | 3.1 | 595.2 |
| Polk | OR | 2.7 | 0.7 | 5.4 | 49.8 |
| Sherman | OR | * | * | * | 2.0 |

Continued...

## PORTLAND
## HISPANIC POPULATION/HOUEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Tillamook | WA | 0.3 | 0.1 | 1.4 | 22.2 |
| Union | WA | 0.5 | 0.2 | 2.0 | 24.8 |
| Wasco | WA | 0.8 | 0.2 | 3.6 | 22.1 |
| Washington | WA | 12.4 | 3.4 | 4.1 | 300.5 |
| Wheeler | WA | * | * | * | 1.4 |
| Yamhill | WA | 3.2 | 0.8 | 5.2 | 61.7 |
| Clark | WA | 5.3 | 1.6 | 2.2 | 238.1 |
| Cowlitz | WA | 1.7 | 0.4 | 2.1 | 83.1 |
| Klickitat | WA | 0.8 | 0.2 | 4.7 | 17.6 |
| Skamania | WA | 0.2 | * | 2.2 | 9.4 |
| Wahkiakum | WA | 0.1 | * | 2.6 | 3.9 |
| TOTAL | | 79.5 | 23.4 | 3.6% | 2,205.3 |

* Designates anumber less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Similar to other Hispanic markets, the Portland ADI is a youthful market, with three-fourths of the population under 35 years of age. Children and teens comprise 39% of the Hispanic population.

Adult males account for 33% of the total Hispanic population, which is somewhat higher than the adult female Hispanic population of 28%.

### PORTLAND
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 6.0 | | 7.5% | |
| Males 25-34 | 9.6 | | 12.1 | |
| Males 35-49 | 6.5 | | 8.2 | |
| Males 50-54 | 1.5 | | 1.9 | |
| Males 55-64 | 1.8 | | 2.2 | |
| Males 65+ | 1.0 | | 1.3 | |
| **Males 18+** | | **26.4** | | **33.2%** |
| Females 18-24 | 4.5 | | 5.7 | |
| Females 25-34 | 8.3 | | 10.4 | |
| Females 35-49 | 5.4 | | 6.8 | |
| Females 50-54 | 0.9 | | 1.1 | |
| Females 55-64 | 1.9 | | 2.4 | |
| Females 65+ | 1.0 | | 1.3 | |
| **Females 18+** | | **22.0** | | **27.7** |
| **Teens (12-17)** | 8.8 | **8.8** | 11.1 | **11.1** |
| **Children (0-11)** | | **22.3** | | **28.0** |
| Children (2-11) | 18.5 | | 23.3 | |
| TOTAL 2+ | 75.7 | | 95.3% | |
| **TOTAL** | | **79.5** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 39

# ORLANDO/DAYTONA BEACH/MELBOURNE

*MARKET SIZE:78,300 HISPANIC POPULATION*

### 1. Hispanic Population

The Orlando/Daytona Beach/Melbourne ADI, located in central Florida, consists of 78,300 Hispanics who reside in nine counties centered around Orange County in the City of Orlando. The Hispanic population in this market has almost doubled since 1980, having grown by 93% in the last eleven years.

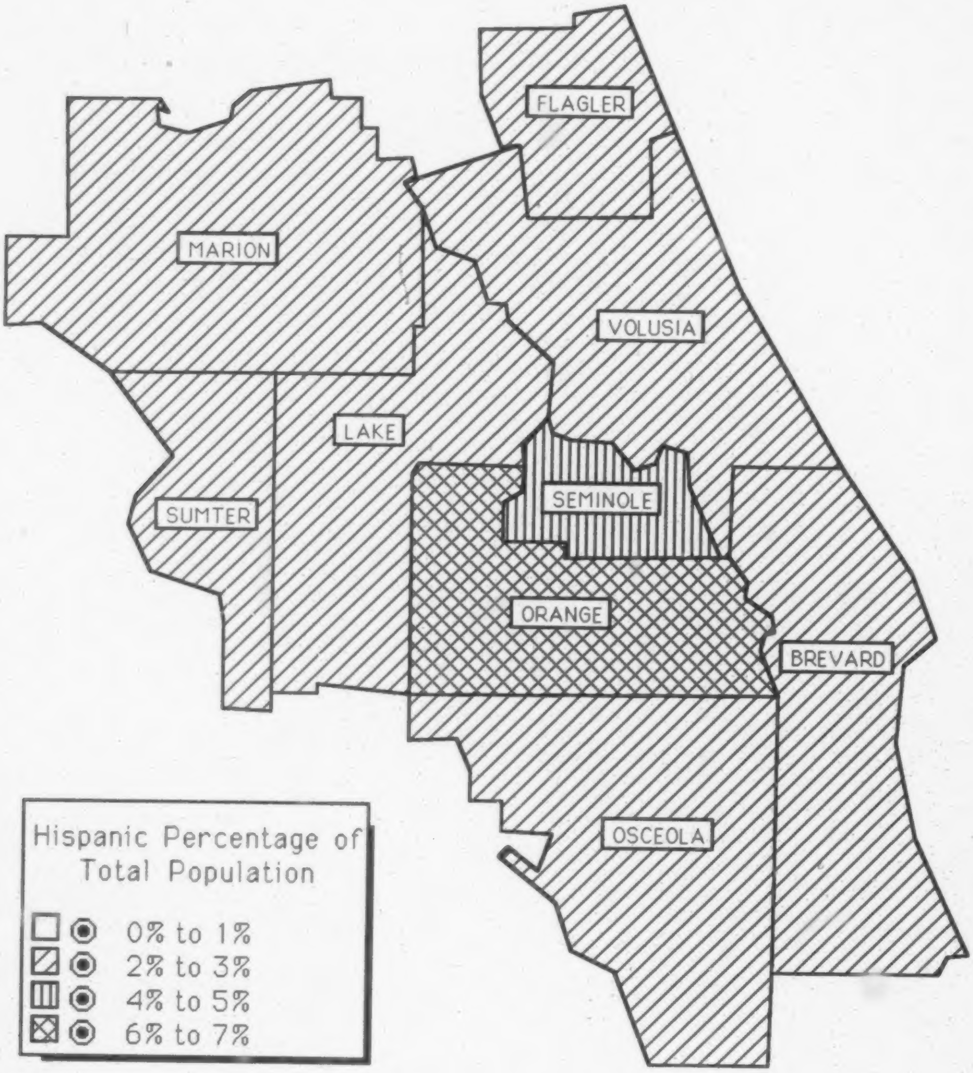
Orange County is the largest Hispanic county with 36,800 Hispanics.

**ORLANDO/DAYTONA BEACH/MELBOURNE**
**HISPANIC POPULATION**
**1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Brevard | FL | 5.3 | 10.6 |
| Flagler | FL | 0.2 | 0.4 |
| Lake | FL | 2.3 | 4.4 |
| Marion | FL | 2.1 | 4.3 |
| Orange | FL | 19.7 | 36.8 |
| Osceola | FL | 1.1 | 2.9 |
| Seminole | FL | 5.2 | 10.5 |
| Sumter | FL | 0.5 | 0.9 |
| Volusia | FL | 4.1 | 7.5 |
| TOTAL | | 40.5 | 78.3 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Orlando / Daytona / Melbourne ADI


FLAGLER
MARION
VOLUSIA
LAKE
SUMTER
SEMINOLE
ORANGE
BREVARD
OSCEOLA
Hispanic Percentage of Total Population
☐ ◉ 0% to 1%
▨ ◉ 2% to 3%
▥ ◉ 4% to 5%
☒ ◉ 6% to 7%

## 2. Hispanic Population/Households - Total Population

Hispanics represent an estimated 4% of the ADI's total population (78,300) of approximately 2.3 million.

The largest Hispanic county, both in terms of absolute numbers and on a percentage basis is Orange County. 36,800 Hispanics, representing 6% of its total estimated 1991 population.

Orange County also accounts for 47% of the area's Hispanic households.

Given a Hispanic population of 78,300 persons, and households of 24,900, the average number of persons per Hispanic household in the Orlando/Daytona Beach/Melbourne ADI equates to 3.1.

### ORLANDO/DAYTONA BEACH/MELBOURNE
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Brevard | FL | 10.6 | 3.4 | 2.6% | 414.8 |
| Flagler | FL | 0.4 | 0.1 | 1.9 | 22.1 |
| Lake | FL | 4.4 | 1.0 | 2.8 | 156.8 |
| Marion | FL | 4.3 | 1.5 | 2.1 | 206.2 |
| Orange | FL | 36.8 | 11.6 | 5.5 | 669.4 |
| Osceola | FL | 2.9 | 0.9 | 2.8 | 102.0 |
| Seminole | FL | 10.5 | 3.4 | 3.6 | 291.8 |
| Sumter | FL | 0.9 | 0.2 | 2.8 | 32.8 |
| Volusia | FL | 7.5 | 2.8 | 2.1 | 357.1 |
| TOTAL | | 78.3 | 24.9 | 3.5% | 2,253.0 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Approximately 28% of the Hispanic population is between the ages of 18 and 34, while almost one third (32%) are under the age of 18.

Adult Hispanic females (35% of the Hispanic population) slightly outnumber adult males, who account for 33% of the Hispanic population of this ADI.

### ORLANDO/DAYTONA BEACH/MELBOURNE HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 5.1 | | 6.5% | |
| Males 25-34 | 6.6 | | 8.5 | |
| Males 35-49 | 7.2 | | 9.2 | |
| Males 50-54 | 1.8 | | 2.3 | |
| Males 55-64 | 2.9 | | 3.7 | |
| Males 65+ | 2.2 | | 2.8 | |
| **Males 18+** | | **25.8** | | **33.0%** |
| Females 18-24 | 4.4 | | 5.6 | |
| Females 25-34 | 6.1 | | 7.8 | |
| Females 35-49 | 8.1 | | 10.3 | |
| Females 50-54 | 1.9 | | 2.4 | |
| Females 55-64 | 3.5 | | 4.5 | |
| Females 65+ | 3.5 | | 4.5 | |
| **Females 18+** | | **27.5** | | **35.1** |
| **Teens (12-17)** | 8.4 | **8.4** | 10.7 | **10.7** |
| **Children (0-11)** | | **16.6** | | **21.1** |
| Children (2-11) | 13.8 | | 17.6 | |
| TOTAL 2+ | 75.5 | | 96.4% | |
| **TOTAL** | | **78.3** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 40

# YAKIMA

*MARKET SIZE: 71,500 HISPANIC POPULATION*

### 1. Hispanic Population

The Yakima ADI has an estimated Hispanic population of 71,500, an increase of 65% from 1980.

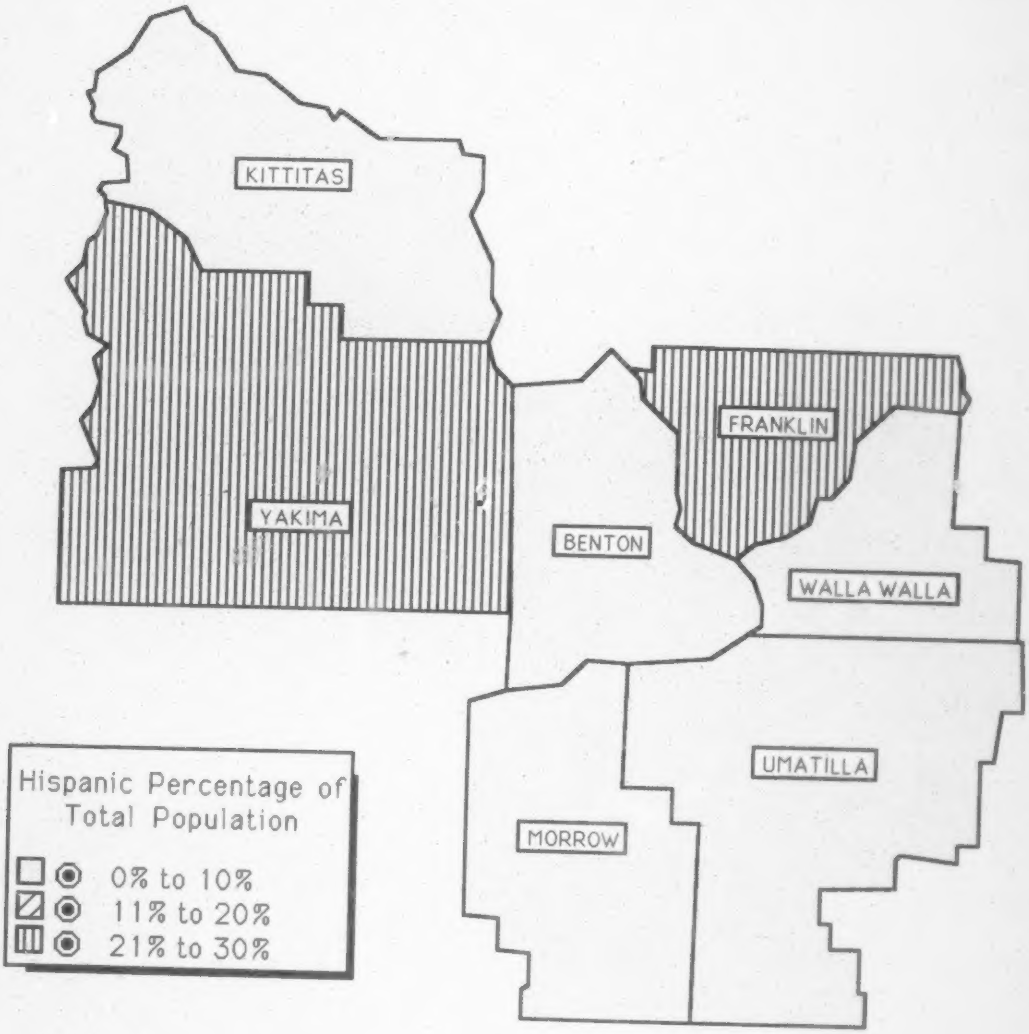
Yakima County accounts for the greatest proportion (46%) of the Hispanic population residing in this market.

**YAKIMA**
**HISPANIC POPULATION**
**1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Morrow | OR | 0.4 | 0.7 |
| Umatilla | OR | 2.7 | 4.4 |
| Benton | WA | 4.7 | 7.3 |
| Franklin | WA | 5.7 | 8.3 |
| Kittitas East | WA | 0.3 | 0.9 |
| Walla Walla | WA | 2.6 | 4.0 |
| Yakima | WA | 27.0 | 45.9 |
| TOTAL | | 43.4 | 71.5 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Yakima ADI


KITTITAS
YAKIMA
BENTON
FRANKLIN
WALLA WALLA
UMATILLA
MORROW
Hispanic Percentage of Total Population
☐ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%

## 2. Hispanic Population/Households - Total Population

Overall, approximately 499,900 persons reside in the Yakima area. With a total Hispanic population consisting of 71,500 persons, this makes the Yakima market 14% Hispanic.

Yakima County is the area most densely populated by Hispanics, with 23% of its population being of Hispanic origin/descent, followed by Franklin County (21% Hispanic).

In total, there are 18,400 Hispanic households in the Yakima ADI which are headed by individuals of Hispanic origin/descent. With a Hispanic population of 71,500, this equates to an average of almost four persons living in each Hispanic household.

### YAKIMA
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Morrow | OR | 0.7 | 0.2 | 8.0% | 8.8 |
| Umatilla | OR | 4.4 | 1.0 | 7.0 | 62.9 |
| Benton | WA | 7.3 | 1.9 | 6.3 | 116.6 |
| Franklin | WA | 8.3 | 2.1 | 21.1 | 39.2 |
| Kittitas East | WA | 0.9 | 0.3 | 5.1 | 18.0 |
| Walla Walla | WA | 4.0 | 1.0 | 7.7 | 51.4 |
| Yakima | WA | 45.9 | 11.9 | 22.6 | 203.0 |
| TOTAL | | 71.5 | 18.4 | 14.3% | 499.9 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The Yakima ADI is a very young market, as over three-fourths of its Hispanic population is under the age of 35.

Within this total, 42% are persons under the age of 18.

There is also a slight gender gap among adult Hispanics; adult females comprise 32% of the total Hispanic population, while adult males constitute under 26% of its population.

### YAKIMA
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 4.4 | | 6.1% | |
| Males 25-34 | 6.0 | | 8.4 | |
| Males 35-49 | 4.6 | | 6.4 | |
| Males 50-54 | 1.0 | | 1.4 | |
| Males 55-64 | 1.2 | | 1.7 | |
| Males 65+ | 1.2 | | 1.7 | |
| **Males 18+** | | **18.4** | | **25.7%** |
| Females 18-24 | 5.9 | | 8.3 | |
| Females 25-34 | 7.5 | | 10.5 | |
| Females 35-49 | 6.1 | | 8.5 | |
| Females 50-54 | 1.2 | | 1.7 | |
| Females 55-64 | 1.3 | | 1.8 | |
| Females 65+ | 1.0 | | 1.4 | |
| **Females 18+** | | **23.0** | | **32.2** |
| **Teens (12-17)** | 8.8 | **8.8** | 12.3 | **12.3** |
| **Children (0-11)** | | **21.3** | | **29.8** |
| Children (2-11) | 18.3 | | 25.6 | |
| TOTAL 2+ | 68.5 | | 95.8% | |
| **TOTAL** | | **71.5** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 41

# MILWAUKEE

*MARKET SIZE: 70,300 HISPANIC POPULATION*

### 1. Hispanic Population

The estimated total number of Hispanics residing within the Milwaukee ADI in 1991 is 70,300.

The most heavily Hispanic populated county in this ten county ADI is Milwaukee County. In 1991, it is estimated that there are 42,000 people of Hispanic origin living within Milwaukee County. Milwaukee County accounts for 60% of the Hispanics residing within this ADI.

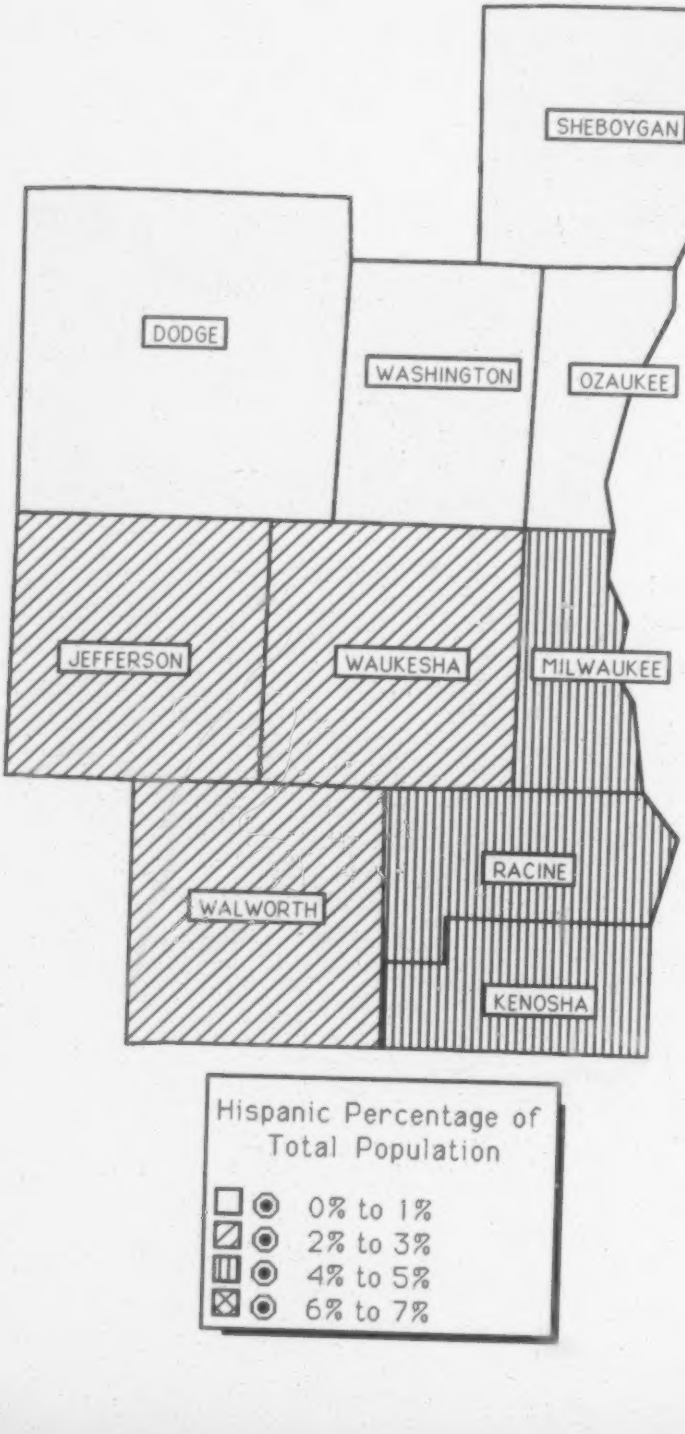
**MILWAUKEE**
**HISPANIC POPULATION**
**1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Dodge | WI | 0.4 | 0.9 |
| Jefferson | WI | 0.2 | 1.2 |
| Kenosha | WI | 2.9 | 4.7 |
| Milwaukee | WI | 27.0 | 42.0 |
| Ozaukee | WI | 0.0 | 0.7 |
| Racine | WI | 6.0 | 10.4 |
| Sheboygan | WI | 0.6 | 1.3 |
| Walworth | WI | NA | 1.8 |
| Washington | WI | NA | 0.7 |
| Waukesha | WI | 2.6 | 6.6 |
| TOTAL | | 39.7 | 70.3 |

NA = Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Milwaukee ADI



SHEBOYGAN
DODGE
WASHINGTON
OZAUKEE
JEFFERSON
WAUKESHA
MILWAUKEE
RACINE
WALWORTH
KENOSHA
Hispanic Percentage of Total Population
0% to 1%
2% to 3%
4% to 5%
6% to 7%

## 2. Hispanic Population/Households - Total Population

For 1991, Strategy Research Corporation estimates a total Milwaukee ADI population (Hispanic and non-Hispanic) of 2.1 million. Forty-seven percent of the total population resides in Milwaukee County. Overall, this ADI is 3% Hispanic, based on a total Hispanic population of 70,300.

There are 20,800 households in the Milwaukee ADI headed by persons of Hispanic origin/descent, producing an average of 3.4 people per Hispanic household. Sixty-two percent of the Hispanic households are located in Milwaukee County.

### MILWAUKEE
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Dodge | WI | 0.9 | 0.2 | 1.2% | 76.9 |
| Jefferson | WI | 1.2 | 0.3 | 1.7 | 72.1 |
| Kenosha | WI | 4.7 | 1.4 | 3.7 | 127.8 |
| Milwaukee | WI | 42.0 | 12.8 | 4.2 | 999.0 |
| Ozaukee | WI | 0.7 | 0.2 | 0.9 | 76.9 |
| Racine | WI | 10.4 | 3.0 | 5.4 | 192.9 |
| Sheboygan | WI | 1.3 | 0.3 | 1.2 | 108.3 |
| Walworth | WI | 1.8 | 0.5 | 2.3 | 78.6 |
| Washington | WI | 0.7 | 0.2 | 0.7 | 100.0 |
| Waukesha | WI | 6.6 | 1.9 | 2.1 | 316.2 |
| TOTAL | | 70.3 | 20.8 | 3.3% | 2,148.7 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Almost three-fourths (74%) of the Milwaukee ADI's Hispanic population are under 35 years of age. Furthermore, 42% of the population are under the age of 18.

In terms of gender, slightly more adult Hispanic men (31%) can be found in this ADI than adult women (27%).

### MILWAUKEE
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 4.5 | | 6.4% | |
| Males 25-34 | 7.2 | | 10.3 | |
| Males 35-49 | 5.3 | | 7.6 | |
| Males 50-54 | 1.7 | | 2.4 | |
| Males 55-64 | 1.7 | | 2.4 | |
| Males 65+ | 1.0 | | 1.4 | |
| **Males 18+** | | **21.4** | | **30.5%** |
| Females 18-24 | 4.6 | | 6.6 | |
| Females 25-34 | 5.6 | | 8.0 | |
| Females 35-49 | 5.5 | | 7.8 | |
| Females 50-54 | 0.7 | | 1.0 | |
| Females 55-64 | 1.5 | | 2.1 | |
| Females 65+ | 1.3 | | 1.8 | |
| **Females 18+** | | **19.2** | | **27.3** |
| **Teens (12-17)** | 7.9 | **7.9** | 11.2 | **11.2** |
| **Children (0-11)** | | **21.8** | | **31.0** |
| Children (2-11) | 18.4 | | 26.2 | |
| TOTAL 2+ | 66.9 | | 95.2% | |
| **TOTAL** | | **70.3** | | **100.0%** |

Source: Strategy Research Corporation

MARKET 42

# WEST PALM BEACH/FT. PIERCE/ VERO BEACH

*MARKET SIZE: 70,100 HISPANIC POPULATION*

## 1. Hispanic Population

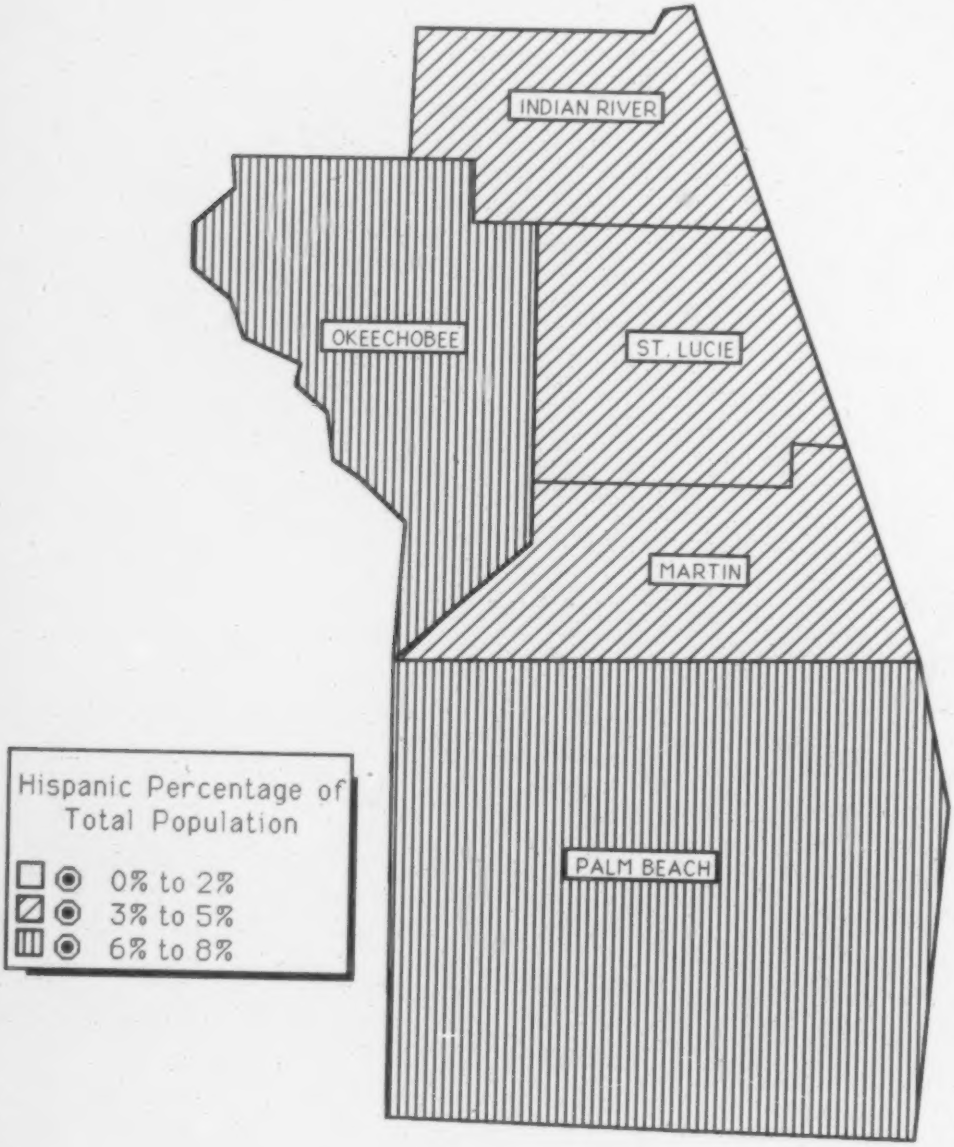
The 1991 estimate of Hispanics living in the West Palm Beach/Ft. Pierce/Vero Beach ADI is 70,100, a more than 100% increase from the number living there eleven years ago. Approximately 83% of this area's Hispanics currently live in Palm Beach County, in and around the City of West Palm Beach.

### WEST PALM BEACH/FT.PIERCE/VERO BEACH HISPANIC POPULATION 1980, 1991

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Indian River | FL | 1.4 | 2.6 |
| Martin | FL | 2.1 | 4.0 |
| Okeechobee | FL | 1.0 | 1.9 |
| Palm Beach | FL | 28.5 | 57.9 |
| St. Lucie | FL | 1.7 | 3.7 |
| TOTAL | | 34.7 | 70.1 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# West Palm Beach / Ft. Pierce / Vero Beach ADI


INDIAN RIVER
OKEECHOBEE
ST. LUCIE
MARTIN
PALM BEACH
Hispanic Percentage of Total Population
☐ ◉ 0% to 2%
▨ ◉ 3% to 5%
▥ ◉ 6% to 8%

## 2. Hispanic Population/Households - Total Population

Overall, Hispanics represent 6% of the ADI's total population. Not surprisingly, the concentration of Hispanics is most dense in Palm Beach County, where the bulk of Hispanics reside. This county has a Hispanic population density of 7%.

A total of 20,300 households within the West Palm Beach/Ft. Pierce/Vero Beach ADI are headed by individuals of Hispanic origin/descent; Approximately 17,100 of these (84%) are located within Palm Beach County.

Overall, the average number of individuals per Hispanic household is 3.5.

### WEST PALM BEACH/FT.PIERCE/VERO BEACH
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Indian River | FL. | 2.6 | 0.6 | 2.9% | 89.7 |
| Martin | FL | 4.0 | 0.8 | 4.1 | 97.6 |
| Okeechobee | FL | 1.9 | 0.6 | 6.3 | 30.2 |
| Palm Beach | FL | 57.9 | 17.1 | 6.5 | 891.4 |
| St. Lucie | FL | 3.7 | 1.2 | 2.5 | 146.6 |
| TOTAL | | 70.1 | 20.3 | 5.6% | 1,255.7 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

In terms of the age and sex profile of the Hispanic population in this Florida market, 30% are under the age of 18, while 59% are under 35 years of age.

There is a slightly higher percentage ditribution of adult Hispanic males (38%) than adult females (33%) in this ADI.

### WEST PALM BEACH/FT.PIERCE/VERO BEACH HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 5.2 | | 7.4% | |
| Males 25-34 | 6.4 | | 9.2 | |
| Males 35-49 | 8.1 | | 11.6 | |
| Males 50-54 | 1.7 | | 2.4 | |
| Males 55-64 | 2.6 | | 3.7 | |
| Males 65+ | 2.4 | | 3.4 | |
| **Males 18+** | | **26.4** | | **37.7%** |
| Females 18-24 | 3.6 | | 5.2 | |
| Females 25-34 | 5.0 | | 7.1 | |
| Females 35-49 | 7.0 | | 10.0 | |
| Females 50-54 | 1.5 | | 2.1 | |
| Females 55-64 | 3.0 | | 4.3 | |
| Females 65+ | 2.9 | | 4.1 | |
| **Females 18+** | | **23.0** | | **32.8** |
| **Teens (12-17)** | 7.1 | **7.1** | 10.1 | **10.1** |
| **Children (0-11)** | | **13.6** | | **19.4** |
| Children (2-11) | 11.1 | | 15.8 | |
| TOTAL 2+ | 67.6 | | 96.4% | |
| **TOTAL** | | **70.1** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 43

# LAS VEGAS

*MARKET SIZE: 69,400 HISPANIC POPULATION*

## 1. Hispanic Population

The 1991 Hispanic population estimate for the Las Vegas ADI is 69,400. This ADI consists of three counties, of which Clark County is the most heavily Hispanic. Clark County Hispanics account for 98% of the ADI's Hispanic population.

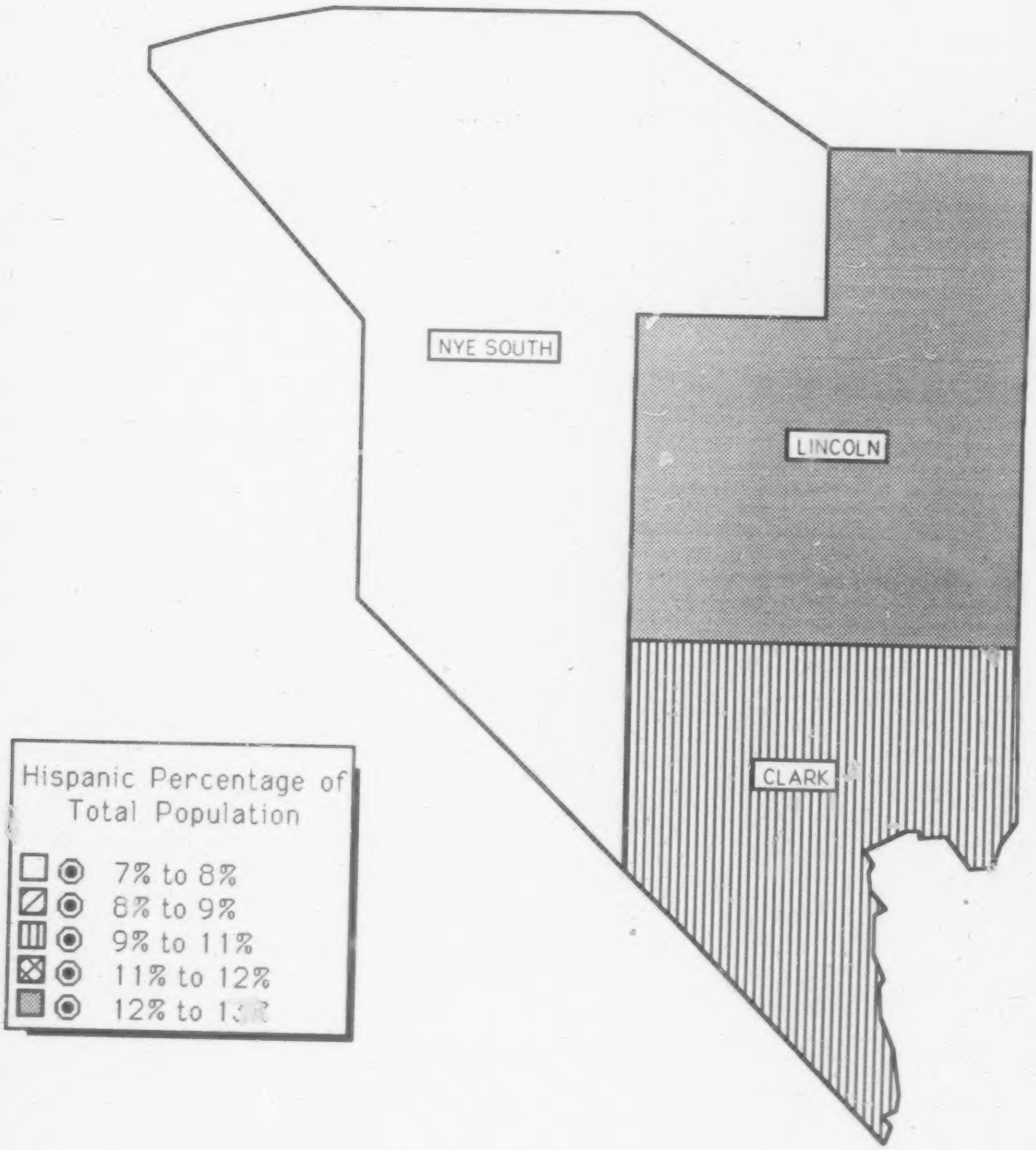
**LAS VEGAS**
**HISPANIC POPULATION**
**1980 - 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Clark | NV | 20.4 | 67.7 |
| Lincoln | NV | NA | 0.5 |
| Nye South | NV | NA | 1.2 |
| TOTAL | | 20.4 | 69.4 |

NA=Not Applicable

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Las Vegas ADI


NYE SOUTH
LINCOLN
CLARK
Hispanic Percentage of Total Population
☐ ◉ 7% to 8%
▧ ◉ 8% to 9%
▥ ◉ 9% to 11%
☒ ◉ 11% to 12%
▩ ◉ 12% to 13%

## 2. Hispanic Population/Households - Total Population

One out of every ten residents in this Nevada market is of Hispanic origin or descent. There are 23,000 Hispanic households in the Las Vegas ADI, of which 22,500 (98%) are located within Clark County.

On average, there are 3 people per Hispanic household in this market.

### LAS VEGAS
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Clark | NV | 67.7 | 22.5 | 10.0% | 677.3 |
| Lincoln | NV | 0.5 | 0.1 | 12.6 | 4.0 |
| Nye South | NV | 1.2 | 0.4 | 7.3 | 16.5 |
| TOTAL | | 69.4 | 23.0 | 10.0% | 697.8 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The Las Vegas ADI is a very young market, as 74% of the Hispanic population is under 35 years of age and 42% are under 18 years of age.

Gender distribution among adult Hispanics is approximately equal, with 30% being male and 29% being female.

### LAS VEGAS
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 4.5 | | 6.5% | |
| Males 25-34 | 7.0 | | 10.1 | |
| Males 35-49 | 5.1 | | 7.3 | |
| Males 50-54 | 1.0 | | 1.4 | |
| Males 55-64 | 1.7 | | 2.5 | |
| Males 65+ | 1.5 | | 2.2 | |
| **Males 18+** | | **20.8** | | **30.0%** |
| Females 18-24 | 4.6 | | 6.6 | |
| Females 25-34 | 6.6 | | 9.5 | |
| Females 35-49 | 5.0 | | 7.2 | |
| Females 50-54 | 0.8 | | 1.2 | |
| Females 55-64 | 1.7 | | 2.5 | |
| Females 65+ | 1.4 | | 2.0 | |
| **Females 18+** | | **20.1** | | **29.0** |
| **Teens (12-17)** | 8.7 | **8.7** | 12.5 | **12.5** |
| **Children (0-11)** | | **19.8** | | **28.5** |
| Children (2-11) | 16.4 | | 23.6 | |
| TOTAL 2+ | 66.0 | | 95.1% | |
| **TOTAL** | | **69.4** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 44

# NEW ORLEANS

*MARKET SIZE:68,200 HISPANIC POPULATION*

### 1. Hispanic Population

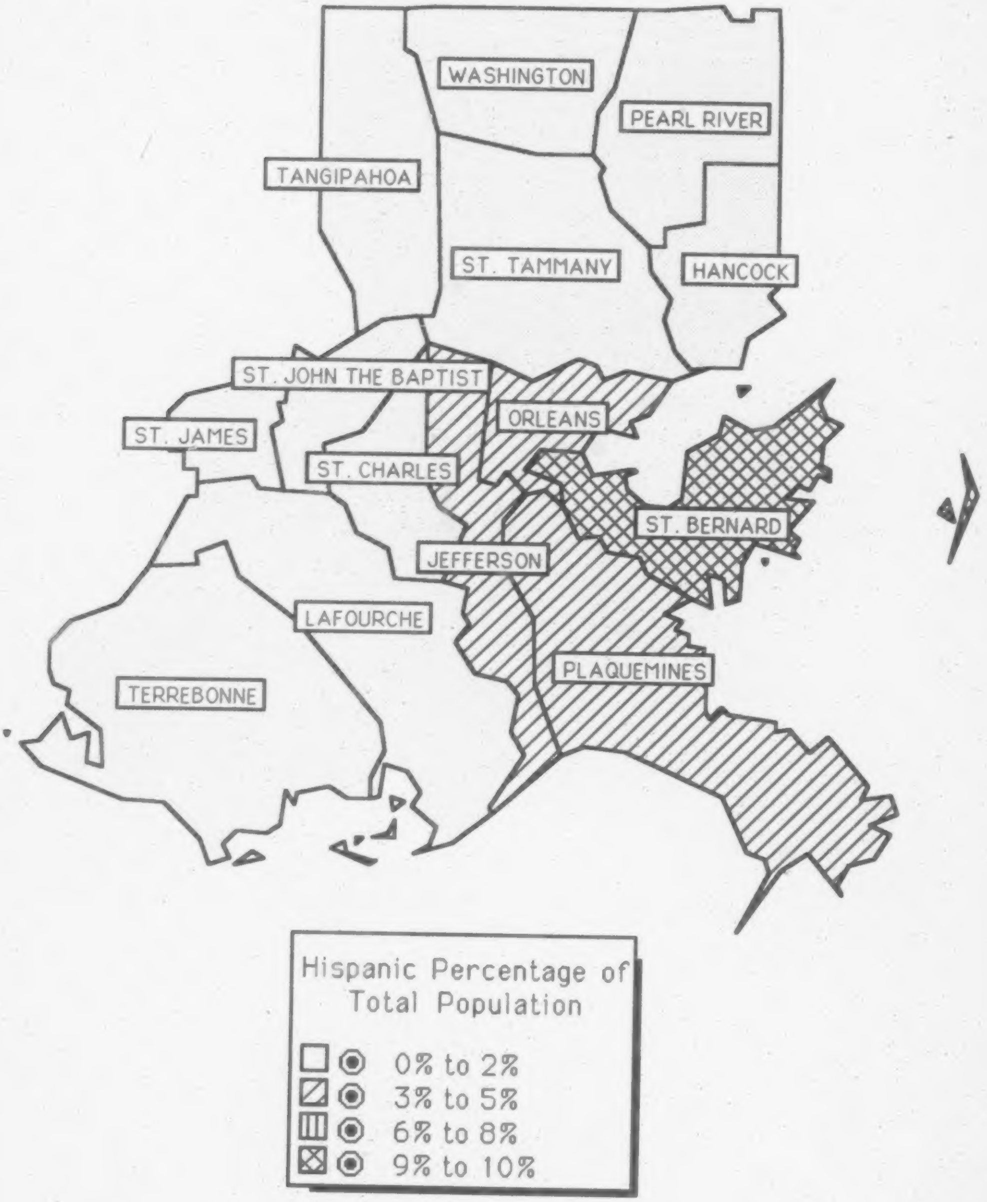
The New Orleans ADI is comprised of 68,200 Hispanic persons, the majority of whom are located in two parishes - Jefferson and Orleans. Together, these two parishes account for 70% of the ADI's total Hispanic population.

**NEW ORLEANS**
**HISPANIC POPULATION**
**1980, 1991**

| Parish | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Jefferson | LA | 24.6 | 26.3 |
| Lafourche | LA | 1.1 | 2.0 |
| Orleans | LA | 18.9 | 21.6 |
| Plaquemines | LA | 0.5 | 0.8 |
| St Bernard | LA | 5.9 | 6.4 |
| St Charles | LA | 1.0 | 1.1 |
| St James | LA | 0.2 | 0.4 |
| St John, Bap. | LA | 0.6 | 1.0 |
| St Tammany | LA | 3.5 | 3.8 |
| Tangipahoa | LA | 1.2 | 1.4 |
| Terrebonne | LA | 1.6 | 1.8 |
| Washington | LA | 0.2 | 0.5 |
| Hancock | MS | 0.5 | 0.7 |
| Pearl River | MS | 0.3 | 0.4 |
| TOTAL | | 60.1 | 68.2 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# New Orleans ADI


WASHINGTON
PEARL RIVER
TANGIPAHOA
ST. TAMMANY
HANCOCK
ST. JOHN THE BAPTIST
ORLEANS
ST. JAMES
ST. CHARLES
ST. BERNARD
JEFFERSON
LAFOURCHE
PLAQUEMINES
TERREBONNE
Hispanic Percentage of Total Population
☐ ◉ 0% to 2%
▨ ◉ 3% to 5%
▥ ◉ 6% to 8%
☒ ◉ 9% to 10%

## 2. Hispanic Population/Households - Total Population

Currently, 4% of the New Orleans ADI is Hispanic (68,200 Hispanics and 1,847,200 total population).

The parish most densely populated with Hispanics is St. Bernard, where 9% of the residents are Hispanic. There are 23,500 households in the New Orleans market headed by Hispanics, of which 73% exist in Jefferson and Orleans Parishes.

The average Hispanic household in this ADI contains approximately 2.9 members.

### NEW ORLEANS
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| Parish | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Jefferson | LA | 26.3 | 8.9 | 5.4% | 487.3 |
| Lafourche | LA | 2.0 | 0.7 | 2.1 | 97.1 |
| Orleans | LA | 21.6 | 8.3 | 3.8 | 569.1 |
| Plaquemines | LA | 0.8 | 0.2 | 3.0 | 27.2 |
| St Bernard | LA | 6.4 | 2.1 | 8.9 | 72.2 |
| St Charles | LA | 1.1 | 0.3 | 2.4 | 46.8 |
| St James | LA | 0.4 | 0.1 | 1.8 | 22.7 |
| St John, Bap. | LA | 1.0 | 0.3 | 2.3 | 44.3 |
| St Tammany | LA | 3.8 | 1.1 | 2.4 | 157.3 |
| Tangipahoa | LA | 1.4 | 0.4 | 1.5 | 95.3 |
| Terrebone | LA | 1.8 | 0.6 | 1.8 | 102.0 |
| Washington | LA | 0.5 | 0.2 | 1.0 | 51.1 |
| Hancock | MS | 0.7 | 0.2 | 2.1 | 34.0 |
| Pearl River | MS | 0.4 | 0.1 | 1.0 | 40.8 |
| TOTAL | | 68.2 | 23.5 | 3.7% | 1,847.2 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Of all the Hispanics in the New Orleans ADI, 59% are under 35 years of age, while 31% are under 18.

In the adult Hispanic market, the gender gap is slightly higher among women, who comprise 36% of the Hispanic population, while men constitute 32%.

### NEW ORLEANS
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 4.0 | | 5.9% | |
| Males 25-34 | 5.6 | | 8.2 | |
| Males 35-49 | 6.7 | | 9.8 | |
| Males 50-54 | 1.4 | | 2.1 | |
| Males 55-64 | 2.6 | | 3.8 | |
| Males 65+ | 1.8 | | 2.6 | |
| **Males 18+** | | **22.1** | | **32.4%** |
| Females 18-24 | 4.0 | | 5.9 | |
| Females 25-34 | 5.6 | | 8.2 | |
| Females 35-49 | 7.0 | | 10.3 | |
| Females 50-54 | 1.7 | | 2.5 | |
| Females 55-64 | 3.2 | | 4.7 | |
| Females 65+ | 3.3 | | 4.8 | |
| **Females 18+** | | **24.8** | | **36.4** |
| **Teens (12-17)** | 7.3 | **7.3** | 10.7 | **10.7** |
| **Children (0-11)** | | **14.0** | | **20.5** |
| Children (2-11) | 11.0 | | 16.1 | |
| TOTAL 2+ | 65.2 | | 95.6% | |
| **TOTAL** | | **68.2** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 45

# PALM SPRINGS

*MARKET SIZE: 64,100 HISPANIC POPULATION*

### 1. Hispanic Population

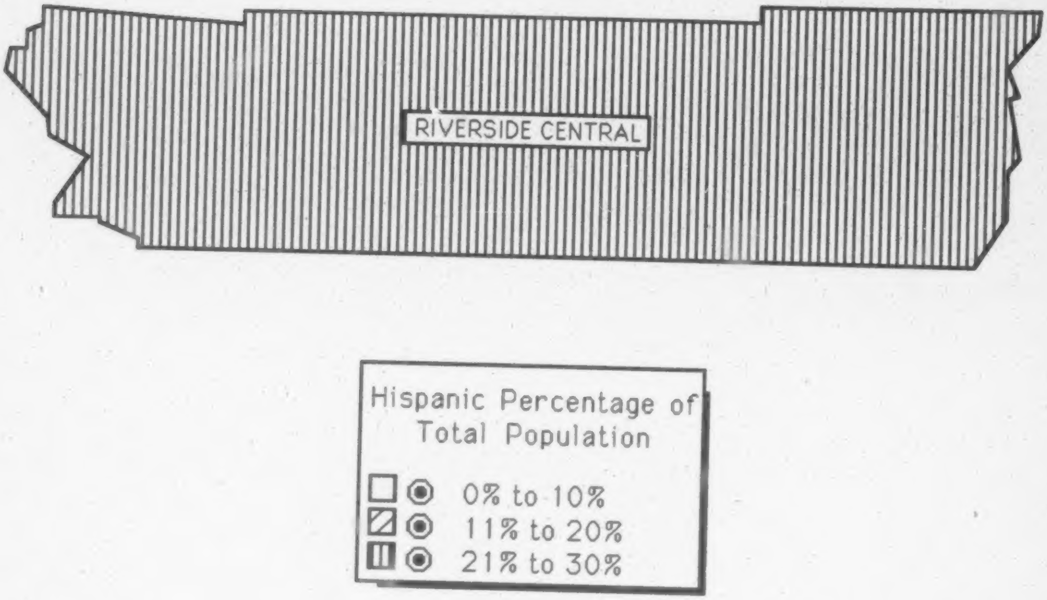
For 1991, Strategy Research Corporation estimates that the Hispanic population of the Palm Springs ADI (which consists of Riverside Central County) will total 64,100.

**PALM SPRINGS**
**HISPANIC POPULATION**
**1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Riverside Cent. | CA | 12.4 | 64.1 |
| TOTAL | | 12.4 | 64.1 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Palm Springs ADI


RIVERSIDE CENTRAL
Hispanic Percentage of Total Population
☐ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%

## 2. Hispanic Population/Households - Total Population

This California ADI has a fairly high concentration of Hispanic residents. Specifically, the Palm Springs market is 21% Hispanic, based on a total population of 309,900 residents.

There are an estimated 16,700 households in the Riverside Central area, which equates to an average of 3.8 people per Hispanic household.

### PALM SPRINGS
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Riverside Cent. | CA | 64.1 | 16.7 | 20.7% | 309.9 |
| TOTAL | | 64.1 | 16.7 | 20.7% | 309.9 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

The Hispanics in the Palm Springs ADI are fairly young; Hispanics under 35 years of age make up 70% of the market, while 40% of the Hispanic population is less than 18 years of age. On the other end of the age scale, adult Hispanics of retirement age (over age 65) make up less than 5% of the Hispanic population.

The adult Hispanic population is equally divided between males and females, as both genders comprise approximately 30% of the total market's population.

### PALM SPRINGS
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 3.9 | | 6.1% | |
| Males 25-34 | 5.9 | | 9.2 | |
| Males 35-49 | 5.5 | | 8.6 | |
| Males 50-54 | 1.1 | | 1.7 | |
| Males 55-64 | 1.8 | | 2.8 | |
| Males 65+ | 1.4 | | 2.2 | |
| **Males 18+** | | **19.6** | | **30.6%** |
| Females 18-24 | 3.8 | | 5.9 | |
| Females 25-34 | 5.6 | | 8.7 | |
| Females 35-49 | 5.2 | | 8.1 | |
| Females 50-54 | 1.1 | | 1.7 | |
| Females 55-64 | 1.9 | | 3.0 | |
| Females 65+ | 1.5 | | 2.4 | |
| **Females 18+** | | **19.1** | | **29.8** |
| **Teens (12-17)** | 7.5 | **7.5** | 11.7 | **11.7** |
| **Children (0-11)** | | **17.9** | | **27.9** |
| Children (2-11) | 14.9 | | 23.2 | |
| TOTAL 2+ | 61.1 | | 95.3% | |
| **TOTAL** | | **64.1** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 46

# ATLANTA

*MARKET SIZE: 62,700 HISPANIC POPULATION*

### 1. Hispanic Population

Fifty-two counties make up the Atlanta ADI. The projected 1991 Hispanic population of the Atlanta ADI has more than doubled since 1980. Specifically, the number of Hispanics in this market is estimated to have grown from 29,300 in 1980 to 62,700 in 1991.

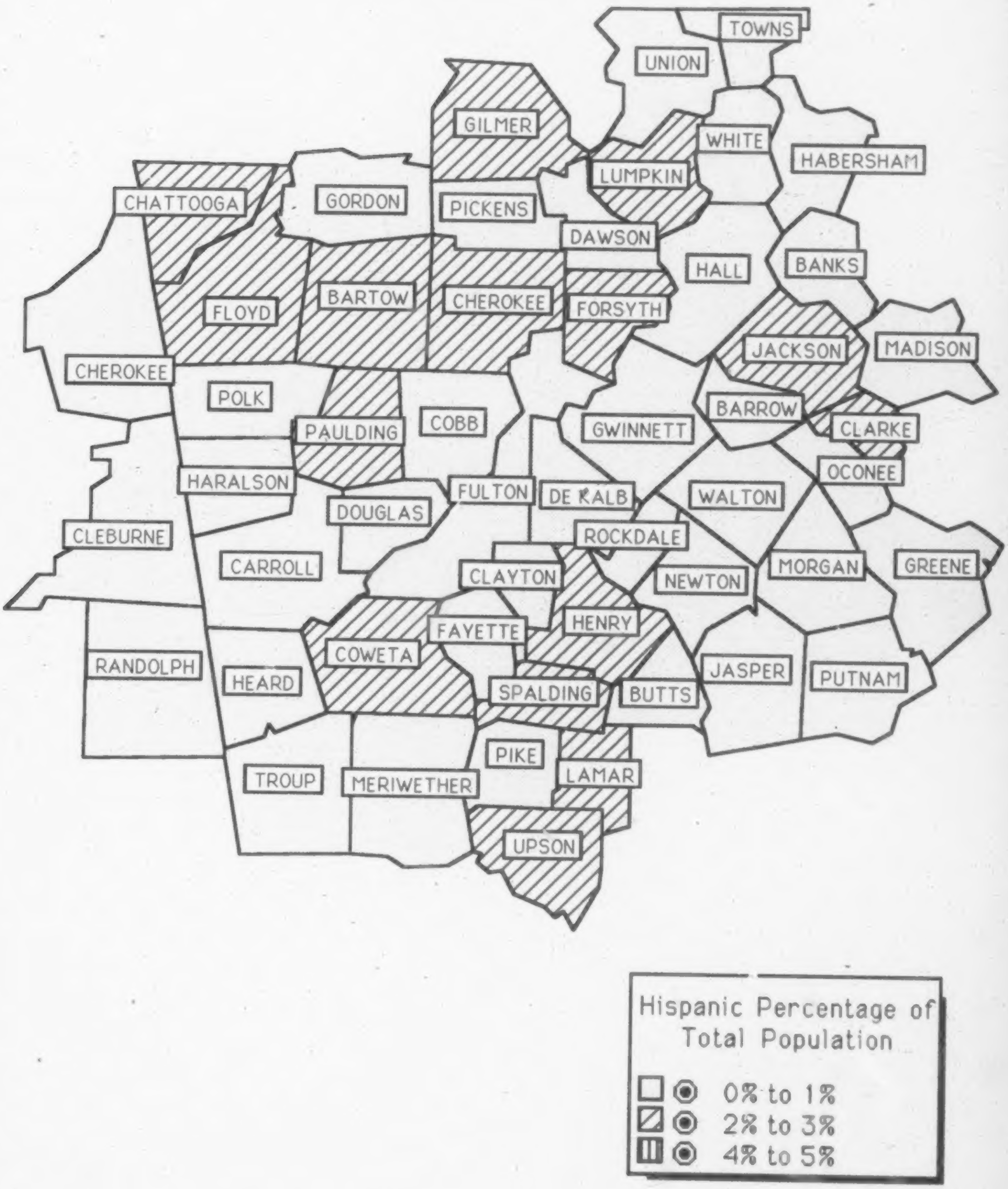
Forty-five percent of the ADI's Hispanics are concentrated in two counties - De Kalb County and Fulton County, which are home to 14,300 and 13,900 Hispanic residents, respectively.

**ATLANTA**
**HISPANIC POPULATION**
**1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Cleburne | AL | NA | 0.1 |
| Randolph | AL | 0.1 | 0.2 |
| Banks | GA | * | 0.1 |
| Barrow | GA | 0.1 | 0.3 |
| Bartow | GA | 0.2 | 0.5 |
| Butts | GA | 0.2 | 0.4 |
| Carroll | GA | 0.4 | 0.8 |
| Cherokee | GA | 0.3 | 1.0 |
| Clarke | GA | 1.0 | 1.8 |
| Clayton | GA | 1.6 | 3.3 |
| Cobb | GA | 2.8 | 7.0 |
| Coweta | GA | 0.3 | 0.7 |
| Dawson | GA | * | * |
| De Kalb | GA | 7.5 | 14.3 |
| Douglas | GA | 0.4 | 0.9 |
| Fayette | GA | 0.2 | 0.8 |
| Floyd | GA | 0.5 | 0.9 |
| Forsyth | GA | 0.1 | 0.4 |

Continued . . .

# Atlanta ADI


TOWNS
UNION
GILMER
WHITE
LUMPKIN
HABERSHAM
CHATTOOGA
GORDON
PICKENS
DAWSON
HALL
BANKS
FLOYD
BARTOW
CHEROKEE
FORSYTH
JACKSON
MADISON
CHEROKEE
POLK
PAULDING
COBB
GWINNETT
BARROW
CLARKE
OCONEE
HARALSON
DOUGLAS
FULTON
DE KALB
WALTON
CLEBURNE
ROCKDALE
CARROLL
CLAYTON
NEWTON
MORGAN
GREENE
FAYETTE
HENRY
COWETA
RANDOLPH
HEARD
SPALDING
BUTTS
JASPER
PUTNAM
PIKE
LAMAR
TROUP
MERIWETHER
UPSON
Hispanic Percentage of Total Population
☐ ⊙ 0% to 1%
▨ ⊙ 2% to 3%
▥ ⊙ 4% to 5%

## ATLANTA
## HISPANIC POPULATION
## 1980, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Fulton | GA | 7.6 | 13.9 |
| Gilmer | GA | * | 0.2 |
| Gordon | GA | 0.1 | 0.2 |
| Greene | GA | 0.1 | 0.2 |
| Gwinnett | GA | 1.4 | 4.7 |
| Habersham | GA | * | 0.2 |
| Hall | GA | 0.6 | 1.3 |
| Haralson | GA | 0.1 | 0.2 |
| Heard | GA | * | 0.1 |
| Henry | GA | 0.3 | 0.8 |
| Jackson | GA | 0.2 | 0.3 |
| Jasper | GA | 0.1 | 0.2 |
| Lamar | GA | 0.2 | 0.3 |
| Lumpkin | GA | * | 0.1 |
| Meriwether | GA | 0.3 | 0.4 |

Continued...

## ATLANTA
## HISPANIC POPULATION
## 19[illegible].1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| M[illegible] | GA | 0.1 | 0.2 |
| New[illegible] | GA | 0.3 | 0.5 |
| Ocone[illegible] | GA | 0.1 | 0.2 |
| Cherokee | AL | NA | 0.1 |
| Paulding | GA | 0.2 | 0.3 |
| Pickens | GA | * | 0.1 |
| Pike | GA | 0.1 | 0.3 |
| Polk | GA | 0.3 | 0.5 |
| Putnam | GA | * | 0.1 |
| Chatanooga | GA | NA | 0.2 |
| Rockdale | GA | 0.3 | 0.7 |
| Spalding | GA | 0.4 | 0.8 |
| Towns | GA | * | 0.1 |
| Troup | GA | 0.4 | 0.8 |
| Union | GA | * | 0.1 |
| Upson | GA | 0.1 | 0.2 |
| Walton | GA | 0.3 | 0.4 |
| White | GA | * | [illegible] |
| Madison | GA | 0.1 | 0.2 |
| TOTAL | | 29.3 | 62.7 |

NA = Not Applicable

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

The Atlanta ADI is less than 2% Hispanic in its composition, with a total population of 3,768,700 and a Hispanic population of 62,700.

Hispanics represent 3% of De Kalb County's total population and 2% of Fulton County's total population base.

A total of 22,200 households in the Atlanta market are Hispanic households. Overall, the average Hispanic household in the Atlanta ADI is comprised of 2.8 members.

### ATLANTA
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Cleburne | AL | 0.1 | * | 0.8% | 13.4 |
| Randolph | AL | 0.2 | 0.1 | 1.0 | 20.6 |
| Banks | GA | 0.1 | * | 0.9 | 11.0 |
| Barrow | GA | 0.3 | 0.1 | 1.1 | 28.5 |
| Bartow | GA | 0.5 | 0.2 | 0.9 | 53.6 |
| Butts | GA | 0.4 | 0.1 | 2.4 | 16.7 |
| Carroll | GA | 0.8 | 0.3 | 1.1 | 71.4 |
| Cherokee | GA | 1.0 | 0.3 | 1.2 | 86.7 |
| Clarke | GA | 1.8 | 0.6 | 2.2 | 83.2 |
| Clayton | GA | 3.3 | 1.1 | 1.8 | 184.6 |
| Cobb | GA | 7.0 | 2.6 | 1.6 | 442.7 |
| Coweta | GA | 0.7 | 0.2 | 1.4 | 51.7 |
| Dawson | GA | * | * | * | 8.0 |
| De Kalb | GA | 14.3 | 4.9 | 2.6 | 558.2 |
| Douglas | GA | 0.9 | 0.3 | 1.1 | 78.9 |
| Fayette | GA | 0.8 | 0.2 | 1.4 | 59.3 |

Continued...

## ATLANTA
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Floyd | GA | 0.9 | 0.3 | 1.1 | 82.1 |
| Forsyth | GA | 0.4 | 0.1 | 0.9 | 43.5 |
| Fulton | GA | 13.9 | 5.5 | 2.1 | 658.6 |
| Gilmer | GA | 0.2 | 0.1 | 1.5 | 13.6 |
| Gordon | GA | 0.2 | 0.1 | 0.6 | 34.9 |
| Greene | GA | 0.2 | 0.1 | 1.6 | 12.4 |
| Gwinnett | GA | 4.7 | 1.5 | 1.4 | 343.3 |
| Habersham | GA | 0.2 | 0.1 | 0.7 | 28.4 |
| Hall | GA | 1.3 | 0.4 | 1.4 | 94.4 |
| Haralson | GA | 0.2 | 0.1 | 0.9 | 21.4 |
| Heard | GA | 0.1 | * | 1.3 | 7.7 |
| Henry | GA | 0.8 | 0.2 | 1.4 | 55.5 |
| Jackson | GA | 0.3 | 0.1 | 1.0 | 30.4 |
| Jasper | GA | 0.2 | 0.1 | 2.3 | 8.6 |
| Lamar | GA | 0.3 | 0.1 | 2.2 | 13.7 |
| Lumpkin | GA | 0.1 | * | 0.8 | 13.2 |

Continued. . .

# ATLANTA
# HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Meriwether | GA | 0.4 | 0.1 | 1.8% | 22.1 |
| Morgan | GA | 0.2 | 0.1 | 1.5 | 13.1 |
| Newton | GA | 0.5 | 0.1 | 1.1 | 45.5 |
| Oconee | GA | 0.2 | 0.1 | 1.2 | 16.6 |
| Cherokee | GA | 0.1 | * | 0.5 | 20.7 |
| Paulding | GA | 0.3 | 0.1 | 0.8 | 37.4 |
| Pickens | GA | 0.1 | * | 0.7 | 14.3 |
| Pike | GA | 0.3 | 0.1 | 2.9 | 10.5 |
| Polk | GA | 0.5 | 0.2 | 1.4 | 34.9 |
| Putnam | GA | 0.1 | * | 0.8 | 13.2 |
| Chatanooga | GA | 0.2 | 0.1 | 0.9 | 22.0 |
| Rockdale | GA | 0.7 | 0.2 | 1.3 | 56.2 |
| Spalding | GA | 0.8 | 0.3 | 1.4 | 56.1 |
| Towns | GA | 0.1 | * | 1.5 | 6.8 |
| Troup | GA | 0.8 | 0.3 | 1.4 | 56.3 |
| Union | GA | 0.1 | * | 0.8 | 11.9 |
| Upson | GA | 0.2 | 0.1 | 0.7 | 27.5 |
| Walton | GA | 0.6 | 0.2 | 1.6 | 38.2 |
| White | GA | 0.1 | * | 0.8 | 13.0 |
| Madison | GA | 0.2 | 0.1 | 0.9 | 22.2 |
| TOTAL | | 62.7 | 22.2 | 1.7% | 3,768.7 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Sixty-four percent of the Hispanic population in this market is under the age of 35. Furthermore, 32% of Hispanics in the Atlanta ADI are under the age of 18.

The proportion of male and female Hispanic adult population is almost equal. Each gender represents approximately 34% of the total population.

### ATLANTA
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 3.7 | | 5.9% | |
| Males 25-34 | 6.9 | | 11.0 | |
| Males 35-49 | 6.1 | | 9.7 | |
| Males 50-54 | 0.6 | | 1.0 | |
| Males 55-64 | 1.5 | | 2.4 | |
| Males 65+ | 2.4 | | 3.8 | |
| **Males 18+** | | **21.2** | | **33.8%** |
| Females 18-24 | 2.8 | | 4.5 | |
| Females 25-34 | 6.8 | | 10.8 | |
| Females 35-49 | 6.7 | | 10.7 | |
| Females 50-54 | 1.4 | | 2.2 | |
| Females 55-64 | 2.5 | | 4.0 | |
| Females 65+ | 1.5 | | 2.4 | |
| **Females 18+** | | **21.7** | | **34.6** |
| **Teens (12-17)** | 5.5 | **5.5** | 8.8 | **8.8** |
| **Children (0-11)** | | **14.3** | | **22.8** |
| Children (2-11) | 11.6 | | 18.5 | |
| TOTAL 2+ | 60.0 | | 95.7% | |
| **TOTAL** | | **62.7** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 47

# CLEVELAND

*MARKET SIZE: 58,800 HISPANIC POPULATION*

### 1. Hispanic Population

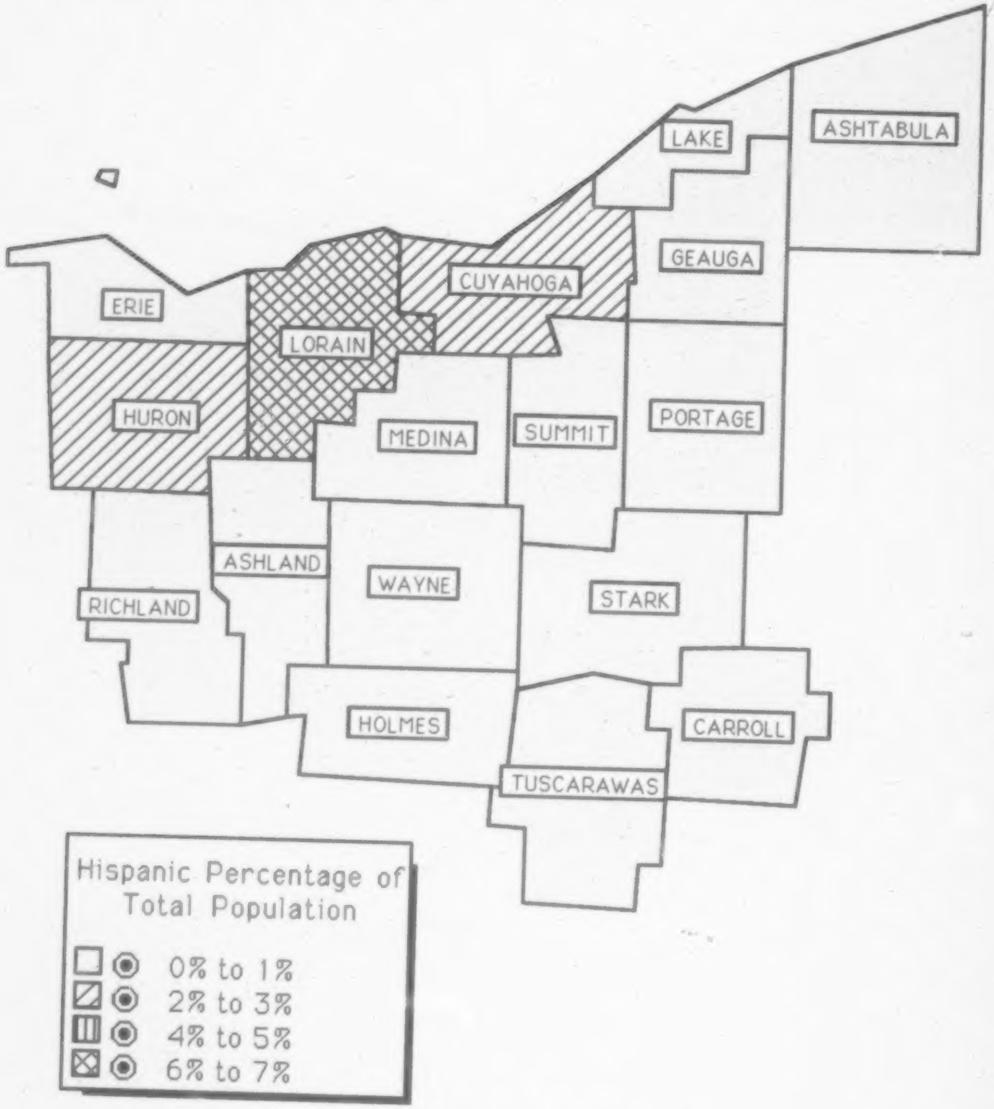
The Cleveland ADI, composed of seventeen counties, has a total Hispanic population of 58,800 persons, over 72% of which live in Cuyahoga and Lorain Counties. Specifically, Cuyahoga County is home to 27,100 Hispanic residents, while Lorain County contains 15,500 Hispanics.

**CLEVELAND**
**HISPANIC POPULATION**
**1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Ashland | OH | NA | 0.2 |
| Ashtabula | OH | 0.7 | 1.2 |
| Carroll | OH | NA | 0.2 |
| Cuyahoga | OH | 16.0 | 27.1 |
| Erie | OH | 0.6 | 1.1 |
| Geauga | OH | * | 0.4 |
| Holmes | OH | * | 0.2 |
| Huron | OH | 0.2 | 0.9 |

Continued...

# Cleveland ADI


ASHTABULA
LAKE
GEAUGA
CUYAHOGA
ERIE
LORAIN
HURON
MEDINA
SUMMIT
PORTAGE
ASHLAND
RICHLAND
WAYNE
STARK
HOLMES
CARROLL
TUSCARAWAS
Hispanic Percentage of Total Population
0% to 1%
2% to 3%
4% to 5%
6% to 7%

## CLEVELAND
## HISPANIC POPULATION
## 1980, 1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Lake | OH | 0.2 | 1.3 |
| Lorain | OH | NA | 15.5 |
| Medina | OH | 0.2 | 0.7 |
| Portage | OH | 0.6 | 1.0 |
| Richland | OH | 0.2 | 1.1 |
| Stark | OH | 0.8 | 3.8 |
| Summit | OH | 0.6 | 3.1 |
| Tuscarawas | OH | * | 0.3 |
| Wayne | OH | NA | 0.7 |
| TOTAL | | 20.1 | 58.8 |

NA = Not Applicable

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

Based on 1991 estimates, Hispanics comprise approximately 2% of the total population of the Cleveland market (58,800 Hispanics among a total population of 3,850,000).

There are little more than 19,000 Hispanic households in the Cleveland market of Hispanic origin/descent.

Overall, the average Hispanic household in Cleveland ADI is comprised of 3.1 members.

### CLEVELAND
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Ashland | OH | 0.2 | 0.1 | 0.4% | 50.5 |
| Ashtabula | OH | 1.2 | 0.3 | 1.2 | 101.0 |
| Carroll | OH | 0.2 | 0.1 | 0.7 | 28.9 |
| Cuyahoga | OH | 27.1 | 9.2 | 1.9 | 1,467.2 |
| Erie | OH | 1.1 | 0.3 | 1.4 | 79.4 |
| Geauga | OH | 0.4 | 0.1 | 0.5 | 80.8 |
| Holmes | OH | 0.2 | 0.1 | 0.6 | 33.7 |
| Huron | OH | 0.9 | 0.3 | 1.6 | 56.8 |
| Lake | OH | 1.3 | 0.4 | 0.6 | 218.8 |
| Lorain | OH | 15.5 | 4.8 | 5.5 | 281.7 |
| Medina | OH | 0.7 | 0.2 | 0.6 | 117.8 |
| Portage | OH | 1.0 | 0.3 | 0.7 | 144.3 |
| Richland | OH | 1.1 | 0.4 | 0.9 | 123.4 |
| Stark | OH | 3.8 | 1.4 | 1.0 | 377.4 |
| Summit | OH | 3.1 | 1.0 | 0.6 | 510.0 |
| Tuscarawas | OH | 0.3 | 0.1 | 0.4 | 76.5 |
| Wayne | OH | 0.7 | 0.2 | 0.7 | 102.0 |
| TOTAL | | 58.8 | 19.3 | 1.5% | 3,850.0 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

About 37% of the Hispanic population in the Cleveland market is under 18 years of age, and 68% is under the age of 35. Furthermore, a mere 4% of the Hispanic population is of retirement age (65+).

By age, the adult Hispanic market in the Cleveland ADI is distributed almost equally between males and females (31.5% and 31.1%).

### CLEVELAND
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 3.7 | | 6.3% | |
| Males 25-34 | 5.4 | | 9.2 | |
| Males 35-49 | 5.3 | | 9.0 | |
| Males 50-54 | 1.0 | | 1.7 | |
| Males 55-64 | 1.9 | | 3.2 | |
| Males 65+ | 1.2 | | 2.1 | |
| **Males 18+** | | **18.5** | | **31.5%** |
| Females 18-24 | 3.5 | | 5.9 | |
| Females 25-34 | 5.1 | | 8.7 | |
| Females 35-49 | 5.3 | | 9.0 | |
| Females 50-54 | 0.9 | | 1.5 | |
| Females 55-64 | 2.4 | | 4.1 | |
| Females 65+ | 1.1 | | 1.9 | |
| **Females 18+** | | **18.3** | | **31.1** |
| **Teens (12-17)** | 6.6 | **6.6** | 11.2 | **11.2** |
| **Children (0-11)** | | **15.4** | | **26.2** |
| Children (2-11) | 12.9 | | 21.9 | |
| TOTAL 2+ | 56.3 | | 95.7% | |
| **TOTAL** | | **58.8** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 48

# KANSAS CITY

*MARKET SIZE: 48,700 HISPANIC POPULATION*

## 1. Hispanic Population

The Kansas City ADI is composed of thirty-two counties from both Kansas and Missouri. As of 1991, the estimated Hispanic population of this market totals 48,700 people. Forty-two percent, or 20,600 of these residents live in Jackson County.

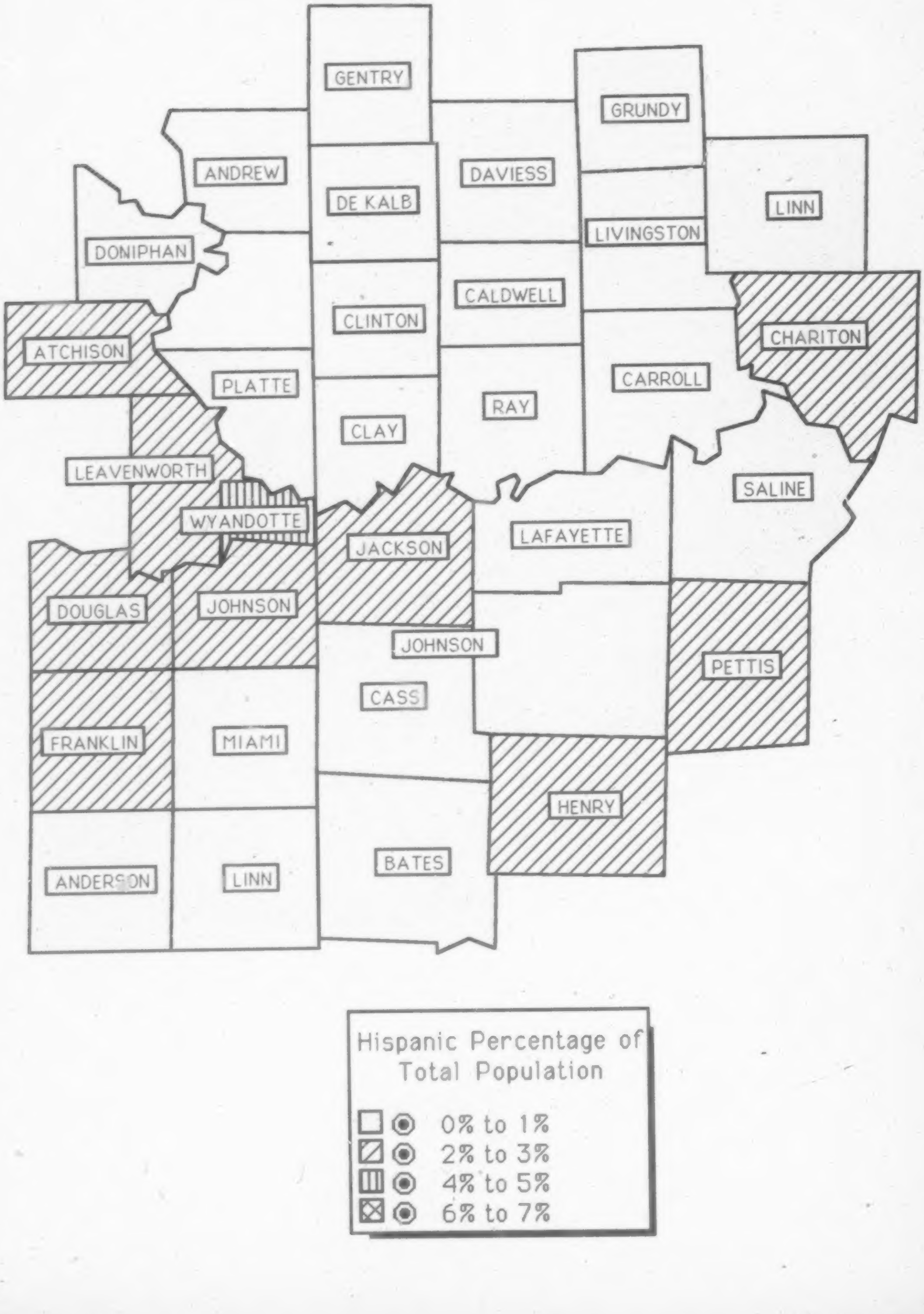
Wyandotte County, the ADI's second most populated county, has 9,700 Hispanic residents, or 20% of the ADI's total Hispanic population .

### KANSAS CITY
### HISPANIC POPULATION
### 1980, 1991

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Anderson | KS | * | * |
| Atchison | KS | 0.1 | 0.3 |
| Doniphan | KS | * | 0.1 |
| Douglas | KS | 1.8 | 2.2 |
| Franklin | KS | 0.3 | 0.4 |
| Johnson | KS | 5.9 | 6.4 |
| Leavenworth | KS | 1.5 | 1.8 |
| Linn | KS | * | * |
| Miami | KS | 0.1 | 0.3 |
| Wyandotte | KS | 8.2 | 9.7 |
| Andrew | MO | * | 0.1 |
| Bates | MO | * | 0.1 |
| Caldwell | MO | * | * |
| Carroll | MO | * | 0.1 |
| Cass | MO | 0.4 | 0.6 |

Continued...

# Kansas City ADI


GENTRY
GRUNDY
ANDREW
DAVIESS
DE KALB
LINN
LIVINGSTON
DONIPHAN
CALDWELL
CLINTON
ATCHISON
CHARITON
PLATTE
CARROLL
RAY
CLAY
LEAVENWORTH
SALINE
WYANDOTTE
LAFAYETTE
JACKSON
DOUGLAS
JOHNSON
JOHNSON
PETTIS
CASS
FRANKLIN
MIAMI
HENRY
BATES
ANDERSON
LINN
Hispanic Percentage of Total Population
☐ ◉ 0% to 1%
▨ ◉ 2% to 3%
▥ ◉ 4% to 5%
☒ ◉ 6% to 7%

## KANSAS CITY
## HISPANIC POPULATION
## 1980,1991
(Continued)

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Clay | MO | 2.3 | 3.0 |
| Clinton | MO | * | 0.1 |
| Daviess | MO | * | * |
| De Kalb | MO | * | * |
| Gentry | MO | * | * |
| Grundry | MO | * | 0.1 |
| Henry | MO | * | 0.1 |
| Jackson | MO | 19.3 | 20.6 |
| Johnson | MO | 0.4 | 0.7 |
| Lafayette | MO | 0.1 | 0 2 |
| Linn | MO | * | 0.1 |
| Livingston | KS | * | 0.1 |
| Pettis | KS | 0.2 | 0.3 |
| Platte | KS | 0.6 | 0.8 |
| Ray | KS | * | 0.1 |
| Saline | KS | 0.1 | 0.2 |
| Chariton | KS | * | * |
| TOTAL | | 41.3 | 48.7 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 2. Hispanic Population/Households - Total Population

Hispanics currently account for 2% of the total Kansas City ADI population, 48,700 Hispanics out of a total population of 2.0 million.

The most densely populated Hispanic county in this ADI is Wyandotte County, yet the area only contains a 5% Hispanic make-up.

This market has approximately 14,600 Hispanic households, 45% (6,500) of which are located within Jackson County.

The average size of the Hispanic household in the Kansas City ADI is 3.3 persons.

### KANSAS CITY
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Anderson | KS | * | * | *% | 8.6 |
| Atchison | KS | 0.3 | 0.1 | 1.7 | 18.1 |
| Doniphan | KS | 0.1 | * | 1.1 | 9.3 |
| Douglas | KS | 2.2 | 0.6 | 2.8 | 77.0 |
| Franklin | KS | 0.4 | 0.1 | 1.8 | 22.8 |
| Johnson | KS | 6.4 | 1.8 | 1.8 | 353.4 |
| Leavenworth | KS | 1.8 | 0.4 | 2.8 | 66.0 |
| Linn | KS | * | * | * | 8.6 |
| Miami | KS | 0.3 | * | 1.3 | 23.7 |
| Wyandotte | KS | 9.7 | 3.0 | 5.4 | 180.5 |
| Andrew | MO | 0.1 | * | 0.6 | 17.1 |
| Bates | MO | 0.1 | * | 0.6 | 17.1 |
| Caldwell | MO | * | * | * | 8.5 |
| Carroll | MO | 0.1 | * | 0.8 | 12.8 |
| Cass | MO | 0.6 | 0.1 | 1.0 | 61.6 |
| Clay | MO | 3.0 | 0.8 | 1.9 | 156.6 |

Continued...

## KANSAS CITY
## HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
## 1991
(Continued)

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Clinton | MO | 0.1 | * | 0.6 | 17.1 |
| Daviess | MO | * | * | * | 8.8 |
| De Kalb | MO | * | * | * | 8.6 |
| Gentry | MO | * | * | * | 8.0 |
| Grundy | MO | 0.1 | * | 0.8 | 12.8 |
| Henry | MO | 0.1 | * | 0.5 | 20.5 |
| Jackson | MO | 20.6 | 6.5 | 3.1 | 665.2 |
| Johnson | MO | 0.7 | 0.2 | 1.7 | 42.2 |
| Lafayette | MO | 0.2 | 0.1 | 0.6 | 34.2 |
| Linn | MO | 0.1 | * | 0.7 | 14.7 |
| Livingston | MO | 0.1 | * | 0.7 | 14.7 |
| Pettis | MO | 0.3 | 0.1 | 0.8 | 38.5 |
| Platte | MO | 0.8 | 0.2 | 1.5 | 54.7 |
| Ray | MO | 0.1 | * | 0.4 | 25.7 |
| Saline | MO | 0.2 | 0.1 | 0.8 | 25.7 |
| Chariton | MO | * | * | 0.4 | 10.0 |
| TOTAL | | 48.7 | 14.6 | 2.4% | 2,043.1 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

This is a fairly young ADI, typical of Hispanic markets - 68% of the Hispanic population is under 35 years of age, while 37% is under the age of 18. Only 11% of all Kansas City Hispanics are 55 years of age or older.

Adult men and women each constitute approximately 31% of the Hispanic population base.

### KANSAS CITY
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 3.4 | | 7.0% | |
| Males 25-34 | 4.3 | | 8.8 | |
| Males 35-49 | 4.0 | | 8.2 | |
| Males 50-54 | 1.1 | | 2.2 | |
| Males 55-64 | 1.1 | | 2.3 | |
| Males 65+ | 1.4 | | 2.9 | |
| **Males 18+** | | **15.3** | | **31.4%** |
| Females 18-24 | 3.5 | | 7.2 | |
| Females 25-34 | 4.1 | | 8.4 | |
| Females 35-49 | 4.2 | | 8.6 | |
| Females 50-54 | 1.0 | | 2.1 | |
| Females 55-64 | 1.5 | | 3.1 | |
| Females 65+ | 1.1 | | 2.2 | |
| **Females 18+** | | **15.4** | | **31.6** |
| **Teens (12-17)** | 4.9 | **4.9** | 10.1 | **10.1** |
| **Children (0-11)** | | **13.1** | | **26.9** |
| Children (2-11) | 10.5 | | 21.6 | |
| TOTAL 2+ | 46.1 | | 94.7% | |
| **TOTAL** | | **48.7** | | **100.0%** |

Source: Strategy Research Corporation

MARKET 49

# ABILENE/SWEETWATER

*MARKET SIZE:48,000 HISPANIC POPULATION*

## 1. Hispanic Population

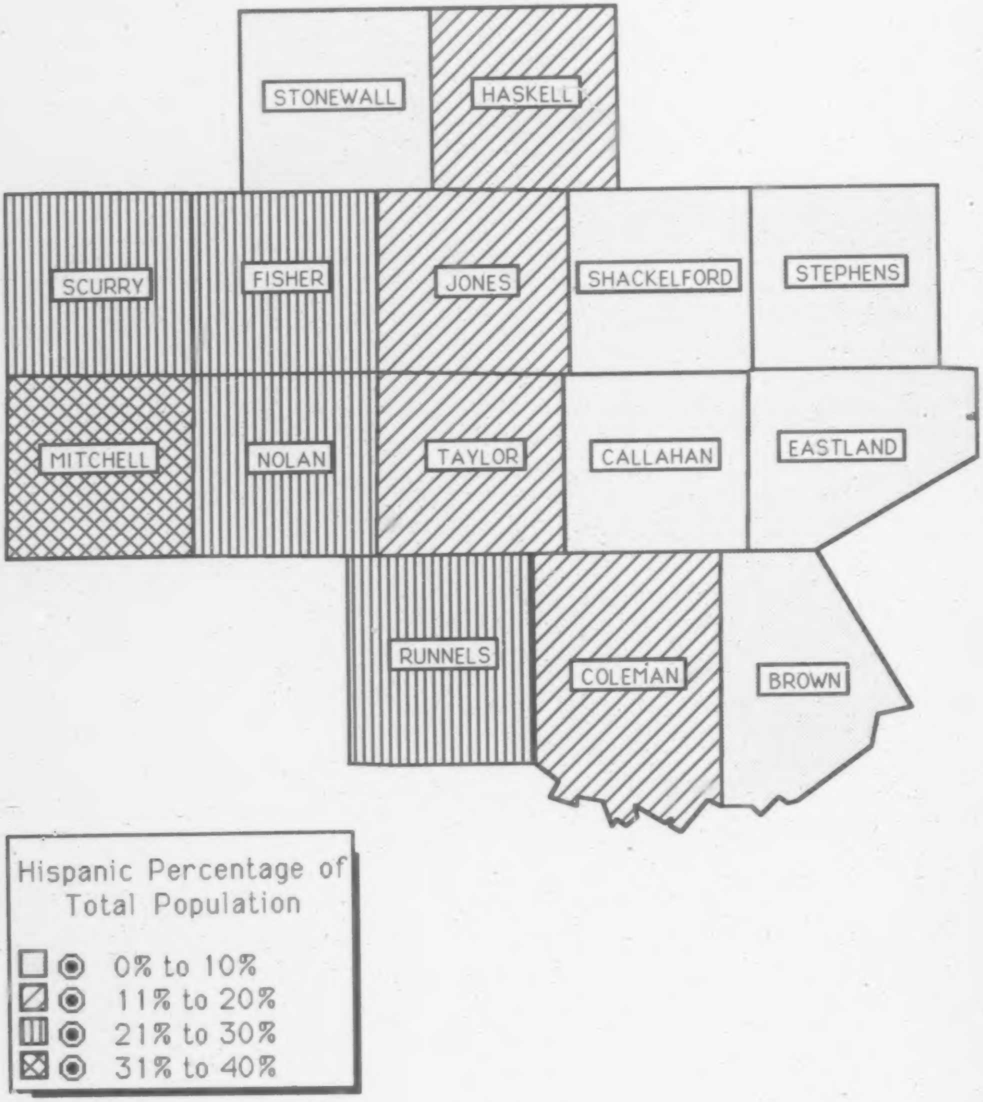
The fifteen counties which comprise the Abilene/Sweetwater ADI contain 48,000 people of Hispanic origin/descent. The county with the highest Hispanic population is Taylor, with 19,500 Hispanics. This represents 41% of the market's Hispanic population base.

### ABILENE/SWEETWATER HISPANIC POPULATION 1980, 1991

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Brown | TX | 2.6 | 3.8 |
| Callahan | TX | 0.4 | 0.5 |
| Coleman | TX | 0.9 | 1.2 |
| Eastland | TX | 0.9 | 1.2 |
| Fisher | TX | 1.1 | 1.3 |
| Haskell | TX | 1.2 | 1.4 |
| Jones | TX | 2.6 | 3.4 |
| Mitchell | TX | 2.3 | 2.7 |
| Nolan | TX | 3.4 | 4.3 |
| Runnels | TX | 2.3 | 2.9 |
| Scurry | TX | 3.4 | 4.7 |
| Shackelford | TX | 0.2 | 0.2 |
| Stephens | TX | 0.6 | 0.7 |
| Stonewall | TX | 0.2 | 0.2 |
| Taylor | TX | 13.0 | 19.5 |
| TOTAL | | 35.1 | 48.0 |

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Abilene/Sweetwater ADI


STONEWALL
HASKELL
SCURRY
FISHER
JONES
SHACKELFORD
STEPHENS
MITCHELL
NOLAN
TAYLOR
CALLAHAN
EASTLAND
RUNNELS
COLEMAN
BROWN
Hispanic Percentage of Total Population
☐ ◉ 0% to 10%
▨ ◉ 11% to 20%
▥ ◉ 21% to 30%
☒ ◉ 31% to 40%

## 2. Hispanic Population/Households - Total Population

With an aggregate fifteen county total population of approximately 317,000 people, the Abilene/Sweetwater ADI is approximately 15% Hispanic.

The most densely populated Hispanic county is Mitchell County, where 31% of the total population is Hispanic. However, the county itself represents only 3% of the entire market's population. Taylor County, whose residents comprise 41% of the total market population, is 15% Hispanic.

An estimated 12,300 households in the Abilene/Sweetwater ADI are headed by people of Hispanic origin or descent, with an average of 3.9 persons per household. Forty-two percent of these households are located in Taylor County.

### ABILENE/SWEETWATER
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Brown | TX | 3.8 | 1.0 | 10.3% | 37.3 |
| Callahan | TX | 0.5 | 0.1 | 3.7 | 13.6 |
| Coleman | TX | 1.2 | 0.3 | 11.8 | 10.4 |
| Eastland | TX | 1.2 | 0.3 | 6.1 | 20.1 |
| Fisher | TX | 1.3 | 0.3 | 23.2 | 5.7 |
| Haskell | TX | 1.4 | 0.3 | 19.4 | 7.2 |
| Jones | TX | 3.4 | 0.8 | 18.5 | 18.4 |
| Mitchell | TX | 2.7 | 0.6 | 31.0 | 8.8 |
| Nolan | TX | 4.3 | 1.2 | 24.9 | 17.5 |
| Runnels | TX | 2.9 | 0.8 | 24.4 | 11.9 |
| Scurry | TX | 4.7 | 1.2 | 24.0 | 19.6 |
| Shackelford | TX | 0.2 | * | 5.0 | 4.0 |
| Stephens | TX | 0.7 | 0.2 | 6.7 | 10.4 |
| Stonewall | TX | 0.2 | 0.1 | 9.1 | 2.3 |
| Taylor | TX | 19.5 | 5.1 | 15.0 | 129.9 |
| TOTAL | | 48.0 | 12.3 | 15.2% | 317.0 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Approximately 72% of the Abilene/Sweetwater market is under 35 years of age. Another indication that this is a young ADI is that 42% of the Hispanic population is under the age of 18.

### ABILENE/SWEETWATER
### HISPANIC AGE/SEX DISTRIBUTION
### 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 3.1 | | 6.5% | |
| Males 25-34 | 4.5 | | 9.4 | |
| Males 35-49 | 3.5 | | 7.3 | |
| Males 50-54 | 0.5 | | 1.0 | |
| Males 55-64 | 1.4 | | 2.9 | |
| Males 65+ | 1.1 | | 2.3 | |
| **Males 18+** | | **14.7** | | **29.4%** |
| Females 18-24 | 3.2 | | 6.6 | |
| Females 25-34 | 3.6 | | 7.5 | |
| Females 35-49 | 3.6 | | 7.5 | |
| Females 50-54 | 0.9 | | 1.9 | |
| Females 55-64 | 1.2 | | 2.5 | |
| Females 65+ | 1.1 | | 2.3 | |
| **Females 18+** | | **13.6** | | **28.3** |
| **Teens (12-17)** | 6.3 | **6.3** | 13.1 | **13.1** |
| **Children (0-11)** | | **14.0** | | **29.2** |
| Children (2-11) | 12.0 | | 25.0 | |
| TOTAL 2+ | 46.0 | | 95.8% | |
| **TOTAL** | | **48.0** | | **100.0%** |

Source: Strategy Research Corporation

## MARKET 50

# PROVIDENCE/NEW BEDFORD

*MARKET SIZE: 39,300 HISPANIC POPULATION*

### 1. - Hispanic Population

The Providence/New Bedford ADI is composed of counties from both Rhode Island and Massachusetts. This seven county market contains an approximate Hispanic population of 39,300 people.

Fifty-three percent of the area's Hispanics reside in Providence County, while another 35% make their homes in Bristol County.

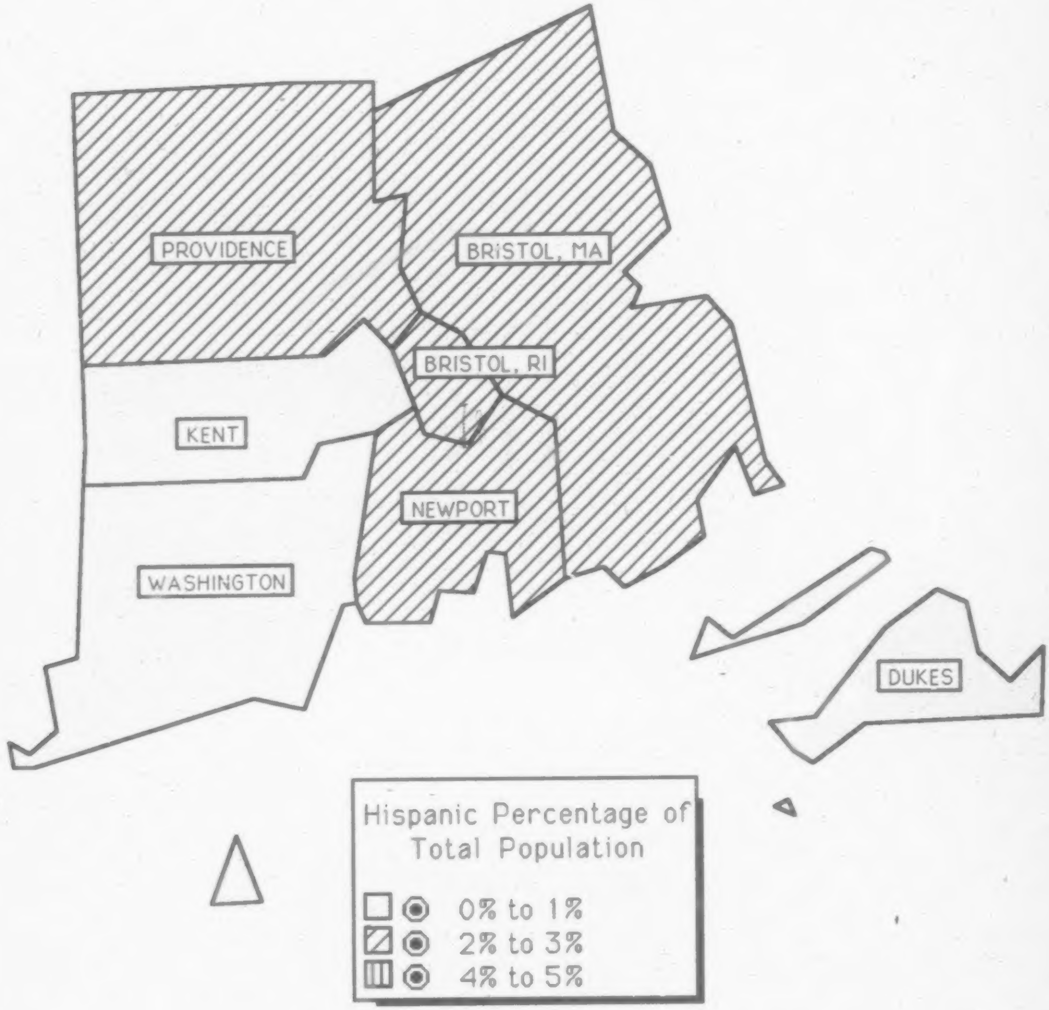
**PROVIDENCE/NEW BEDFORD**
**HISPANIC POPULATION**
**1980, 1991**

| County | State | 1980 Hispanic Population (000) | 1991 Hispanic Population (000) |
|---|---|---|---|
| Bristol | MA | 11.1 | 13.6 |
| Dukes | MA | * | 0.1 |
| Bristol | RI | 0.8 | 0.9 |
| Kent | RI | 1.1 | 1.4 |
| Newport | RI | 1.3 | 1.6 |
| Providence | RI | 16.2 | 20.7 |
| Washington | RI | 0.8 | 1.0 |
| TOTAL | | 31.3 | 39.3 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

# Providence / New Bedford ADI


PROVIDENCE
BRISTOL, MA
BRISTOL, RI
KENT
NEWPORT
WASHINGTON
DUKES
Hispanic Percentage of Total Population
☐ ◉ 0% to 1%
▨ ◉ 2% to 3%
▥ ◉ 4% to 5%

## 2. Hispanic Population/Households - Total Population

Together, the counties which make up the Providence/New Bedford ADI encompass a total population of approximately 1,529,100 people. Of this total, about 3% are of Hispanic origin/descent.

The largest county in the market, Providence County, is also the one most densely populated with Hispanics. Out of the 609,000 persons that live in Providence County, 20,700 are Hispanic, producing slightly more than a 3% Hispanic composition.

There are 12,700 Hispanic households in the Providence/New Bedford ADI, producing an average of 3.1 people per household.

### PROVIDENCE/NEW BEDFORD
### HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
### 1991

| County | State | Hispanic Population (000) | Hispanic Households (000) | Percent Of Total Population | Total Population (000) |
|---|---|---|---|---|---|
| Bristol | MA | 13.6 | 4.6 | 2.7% | 504.6 |
| Dukes | MA | 0.1 | * | 0.8 | 12.5 |
| Bristol | RI | 0.9 | 0.3 | 1.9 | 47.4 |
| Kent | RI | 1.4 | 0.5 | 0.9 | 155.6 |
| Newport | RI | 1.6 | 0.5 | 1.8 | 88.9 |
| Providence | RI | 20.7 | 6.5 | 3.4 | 609.0 |
| Washington | RI | 1.0 | 0.3 | 0.9 | 111.1 |
| TOTAL | | 39.3 | 12.7 | 2.6% | 1,529.1 |

* Designates a number less than 100.

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

## 3. Age/Sex Of The Population

Thirty-five percent of the Providence/New Bedford ADI is under 18 years of age. Furthermore, 64% are under the age of 35.

Adult men form 32% of the Hispanic population, while adult women comprise 34% of the Hispanic population.

### PROVIDENCE/NEW BEDFORD HISPANIC AGE/SEX DISTRIBUTION 1991

| | Hispanic Population (000) | | Percent Distribution | |
|---|---|---|---|---|
| Males 18-24 | 2.3 | | 5.9% | |
| Males 25-34 | 3.5 | | 8.9 | |
| Males 35-49 | 3.6 | | 9.2 | |
| Males 50-54 | 0.6 | | 1.5 | |
| Males 55-64 | 1.4 | | 3.6 | |
| Males 65+ | 1.0 | | 2.5 | |
| **Males 18+** | | **12.4** | | **31.6%** |
| Females 18-24 | 2.3 | | 5.8 | |
| Females 25-34 | 3.4 | | 8.6 | |
| Females 35-49 | 3.8 | | 9.7 | |
| Females 50-54 | 0.8 | | 2.0 | |
| Females 55-64 | 1.4 | | 3.6 | |
| Females 65+ | 1.6 | | 4.1 | |
| **Females 18+** | | **13.3** | | **33.8** |
| **Teens (12-17)** | 4.0 | **4.0** | 10.2 | **10.2** |
| **Children (0-11)** | | **9.6** | | **24.4** |
| Children (2-11) | 8.0 | | 20.4 | |
| TOTAL 2+ | 37.7 | | 96.0% | |
| **TOTAL** | | **39.3** | | **100.0%** |

Source: Strategy Research Corporation

# APPENDIX

## The 1990 Census

By the time that its final counts have been released, the Bureau of the Census will have settled on an undercount of Hispanics by as much as 10 to 12%. The following paragraphs will shed some light on how that may have occurred.

In the years preceding the 1990 Census, the Bureau attempted to learn from the undercount of the 1980 enumeration. As a result, certain programs were placed into the methodology for the 1990 Census that the Bureau hoped would correct the deficiencies of the previous census. However, the mail-out/mail-back data collection procedure continued as the prevalent methodology.

In April 1988, the Chief of the Decennial Planning Division, Bureau of the Census, circulated the text of a presentation to the Population Association of America entitled The *1990 Census of the United States: Issues and Perspectives*. The document provides in loose detail the preparations and precautions being taken in readiness for the 1990 enumeration of the U. S. population. The basic census mandate was:

> **...the need for population counts by December 31 of the census year for reapportionment and for counts at small area levels for state redistricting by April 1 of the following year...**

The following details some of the precautions and methodology that were to be employed:

> **Most of the population lives in housing units, so a complete inventory of addresses is critical to a successful census. Where we do a mail-out/mail-back census, these addresses must be readily recognizable both by the US Postal Service (USPS), and by census workers; that is, the mailing address and the unit location must be virtually the same. In areas of the country where this is not the case, for instance, where general or rural delivery is the norm, the mailout/mailback methodology is not as efficient...**
>
> **...for pre-identified rural areas where the addressing systems are problematic, we will do what we call the late prelist/update/leave/mail-back procedure. Beginning in the fall of 1989, census workers will canvas these areas to list units using location descriptions; these addresses will be computerized and listed out to support delivery of questionnaires by census enumerators, rather than the postal service, just before Census Day. This procedure allows two physical checks of the address lists, without relying on the postal service to get the questionnaires to the right units...**

Even in prelisted areas where mailout/mailback will be done, we will have improved the quality of the lists by doing an early postal check, and following up in problem areas before census day. This was not done in 1980.

We also have replaced mailout/mailback procedures for areas within cities that are difficult to enumerate by mail. Our regional offices will designate city blocks with housing projects where mail delivery is unreliable due to missing or non-unique mailboxes; and where large numbers of people belonging to groups we have undercounted in previous censuses live. In these areas, we will hire indigenous enumerators earlier than other census workers and train them to promote as well as take the census in their areas. They will deliver the census questionnaires in these buildings and request they be returned by mail; and follow up if they are not.

The physical check of the addresses, called precanvas, will be expanded to check unit designations as well as number of units; and the postal check procedures have been refined.

We will provide census counts to local officials to check both before (when possible) and after the census so that they may identify major coverage deficiencies.

We will maintain and have improved on the special coverage improvement efforts targeted at populations traditionally undercounted. For instance, we have a new procedure for counting homeless people that will be administered nationally.

Special procedures for enumerating on American Indian reservations and Alaska Native villages have been defined.

...expanded resources have been devoted to increasing the participation of language, ethnic, and racial minorities in the 1990 census.

Direct promotion and outreach efforts are targeted at all segments of the Nation and the local community...In addition to the general audience advertising agency, two firms, targeted for the Black and Hispanic population, are also involved through the Ad Council. We are already working with national and regional organizations servicing and representing Black, Hispanic, Asian and Pacific Islander, and American Indian and Alaska Native communities to inform them about the census and request not only agreement, but active cooperation with the census.

> **We have expanded our efforts to reach young people in elementary and high schools through our Census Education Project and in preschool through our Head Start Initiative.**
>
> **Several projects are aimed at specific segments of minorities communities, such as migrant workers.**
>
> **In areas expected to have large numbers of language minorities, the questionnaire mailing will be preceded by a motivational flyer in several languages, urging people to fill out their forms and noting how expanded language assistance may be obtained. The questionnaire package itself will contain an insert explaining the importance of participating in the census.**

The assumption in all of these preparations and programs is the accuracy of the housing unit enumeration (a count and list) and the willingness of the populace to complete and return a brief form. In most metropolitan areas of the country, major portions of some minority groups, for example, an estimated 13% of Hispanics, did not receive a questionnaire to return. Nationwide, then, a total of 14% missed the opportunity to be counted by not obtaining, completing and/or returning a questionnaire.

> No precautions or programs were established to enumerate those who did not want to be counted, with the possible exception of the homeless.
>
> No precautions or programs were established to enumerate those that benefitted from not being counted.
>
> No precautions or programs were established to enumerate those that did not want to reveal the actual status or nature of the household and therefore elected to not return the questionnaire.

In April 1988 the Decennial Planning Division, Bureau of the Census, circulated the text of a presentation to the Population Association of America, entitled *The Role of Participant Observation Research in Understanding the Census Undercount.* The document provides a brief history of the participant observation research sponsored by the Bureau of the Census since the 1960's. The following are excerpts describing some of the more recent findings reported by participant observation researchers in an attempt to understand the undercount.

The 1986 Los Angeles Test Census was conducted to test the ideas of the National Research Council in conjunction with the Post Enumeration Survey (PES). Three experienced field workers from Los Angeles were selected and were assigned separate Hispanic neighborhoods comprising two block areas of low-income Hispanics with an admixture of undocumented residents.

> **Most of the persons missed by the census and found by the participant observers could not be assigned to a single cause, because the causes were often related. One report, for example, cited three major reasons for coverage problems: undocumented immigrants who were reluctant to be counted, dwelling units the Census Bureau did not find, and unlicensed apartments added to dwelling units. It was pointed out that undocumented immigrants frequently live in illegally converted units, and these units are frequently missing from the bureau's lists of addresses. Another researcher found a number of persons missed in the census count who were receiving public welfare payments, and whose reluctance to be counted the researchers attributed to a fear of jeopardizing recipiency status.**
>
> **Overall in the six (6) blocks studied, the participant observers counted 10% to 27% more people than did the census...a significant number of the uncounted Hispanics in these neighborhoods lived in illegally converted apartments that were missed in the census. Approximately half the missed persons were males and half were females, and a relatively large number (40%) were under 15.**

Similar results have been achieved by other research efforts in 1968 and 1969: "in an urban Northeastern Black neighborhood," in a 1970 paper written "on Puerto Rican household structure, income strategies and survey estimates" (covering nearly 5,000 households), and in 1986, "in low income Black neighbor-hoods in Boston." While other research has been conducted and sponsored by the Census Bureau over the past ten years, most of that research was much less successful, primarily because novice field workers were used and the data was considered less reliable or predictable.

Other cases of participant observation research have resulted in different results. A 1980 paper on Census enumeration in urban Black neighborhoods reported:

> **...based on his observations in Boston, ... when local people were hired as temporary census enumerators, they tended to cooperate in under-reporting of Black men, because they shared the respondents' experiences and fears.**

In the previously mentioned participant observation research conducted in 1986, in low income Black neighborhoods in Boston, the author reported:

> **...interesting findings related to the role of interviewers in coverage error. In observing the interviews and talking to Bureau field staff, it was found that local interviewers were often fully aware of coverage errors that were introduced by cultural differences or reluctance to respond. The author found that in some ways the management of field staff actually discouraged full coverage.**
>
> **It was found that interviewers were often indirectly penalized when they attempted to report complete household membership. The Census Bureau judges interviewer performance on completion of interviews, which became extremely difficult in the case of persons (predominantly men) who were seldom present or acknowledged at the sample address. Interviewers who ignored this kind of person eliminated a potential problem for themselves, but contributed to overall coverage error.**

While these observations and discoveries should have been self-correcting in eliminating undercounts by the Bureau of the Census, ...undercounts persist.

In March 1990 the Bureau of the Census circulated a *Statistical Brief* on *Hispanics in the United States*. The brief (SB-4-90) is one of a series that presents information of current policy interest. It profiles "the social and economic characteristics of Hispanics in the United States and of the groups that together form the Hispanic population." The document describes the Hispanic family, education, jobs, income and poverty, as follows:

> **In 1988, 27% or 5.4 million persons of Hispanic origin, were living in poverty...About one (1) out of every six (6) persons living in poverty was Hispanic. One-half of all Hispanics living in poverty were under 18 years old...Consequently, Hispanics were twice as likely to receive government assistance (Aid to Families with Dependent Children, General Assistance, Supplemental Security Income, Medicaid, food stamps, or housing assistance). One-third of Hispanics had some type of benefits between 1984 and mid-1988 and 15% received assistance each month. If the value of food stamps is added to money income, then one (1) out of five (5) Hispanics experienced one or more months when at least half of their income came from cash assistance and/or food stamps.**

Over one quarter of all Hispanics that were living in poverty, were living in a situation that potentially might have led to under-reporting. The strength of the numbers of Hispanics in poverty only serve to reinforce the findings of "The 1986 Los Angeles Test Census " ...a number of persons missed in the census count who were receiving public welfare payments, and whose reluctance to be counted (was) attributed to a fear of jeopardizing recipiency status."

On September 10, 1990, National Public Radio's program "Morning Edition" reported on measures cities were taking to insure there would be no undercount in the 1990 Census. Celeste Wesson was reporting...

> **...And that's why Detroit officials, who say they have 1.3 million citizens, are very upset, that preliminary figures from the Census Bureau report only 970,000. The reason is a Michigan law which grants any city with more than a million people the power to levy special taxes.**
>
> **Even in California, which grew so much after the 1980 census that it could gain seven new seats in the House of Representatives, there's concern about an undercount. Los Angeles says the preliminary count is as much as 10% below projections and plans to challenge the figures.**
>
> **A city demographer is near the corner of Pleasant and Prospect in East Los Angeles, a mostly Latino neighborhood near downtown. 'This is an example of something that's really hard to figure out. This is a commercial building, but it looks like there's a trailer in the back that could be lived in. Now I don't know if this is residential or not.' He is literally counting the number of dwellings he can find. City records, like utility-meter lists, show 52 dwellings on this census block, but the Census Bureau told the city it counted only 20.**
>
> **(Demographer) 'We're in the process of field checking our computer list for those blocks where we have five or more discrepancies between our count and the Census Bureau's count. We have 870 blocks where we have such a discrepancy. ... And you're also an urban archaeologist. Now, here is a building that's a market, but behind the market, there's an apartment. But you don't know that unless you dig a little bit.'**
>
> **(Demographer) 'Some of the monies are distributed based on percentage of people in poverty and percentage of people living in substandard units. People in poverty, people in substandard units are likely to be undercounted at a greater rate.' ...New York, Los Angeles, Detroit and several other cities could revive a lawsuit they filed to get the census to use a particular method to make a statistical correction, especially of the usual undercounted minorities.**

In fact, 17% of all cities challenged the 1990 Census count. A total of 8,098 municipal jurisdictions responded to the census; 6,260 of these cities (77%) indicated that the population counts were short, while only 5,102 of the challenges (63%) were in a form acceptable to the census. A list of twenty metropolitan areas that are a part of these challenges indicate that **there is a 571,522 dwelling unit undercount, in these cities alone.**

As previously noted, Strategy Research has conducted a nationwide survey among Hispanics in conjunction with the **1991 U.S. HISPANIC MARKET STUDY**. In these surveys of Hispanics, respondents were asked, among others, two questions relating to the census:

***Did your household receive a U. S. Census questionnaire?***

and

***Did you or someone in your family complete the census questionnaire and return it to the Census Bureau?***

Overall, 12.0% of Hispanics, nationwide, reported they did not receive a U. S. Census questionnaire. However, even more importantly, **12.9% of all Hispanics reported they did not have an opportunity to be counted, in that they either did not receive or obtain, or complete and return a questionnaire to the Census Bureau. This equates to an uncounted Hispanic population of approximately of 2.9 million.**

Shortly after the preliminary results of the 1990 Census were published, about 15%, or about 6,000 jurisdictions in the country, including all of its 51 largest cities, challenged the Census Bureau's counts of housing units in hopes of increasing their population figures. Figures provided by the country's 15 largest cities alone, suggest that as many as 500,000 housing units, half of them in New York City, may have been overlooked by the Census. Los Angeles claims the Census has missed 3.7% of its homes, Chicago claims nearly 70,000 dwelling units were missed and San Francisco claims at least 1,750 units were missed by the Census.

The following pages contain copies of a sampling of newspaper articles that have appeared in recent months reporting on the concerns of numerous jurisdictions around the country about the Census undercount in their respective communities.

# Dade begins double-check on census

**By RICHARD WALLACE**
Herald Staff Writer

A day after the Census Bureau released its preliminary head count of Dade County and its cities, the complicated process of verifying the numbers began Tuesday.

Within local governments, planners were preparing to review and analyze the data filling reels and reels of computer tapes.

The only thing that seemed certain was this: Preliminary population statistics are likely to be less than perfect, and subject to change.

"The whole process is difficult in Dade because of the characteristics of the population here," said Oliver Kerr, a Metro-Dade planner who specializes in analytical research.

People-counting in Dade is complicated because the county has large blocks of minority residents and recent immigrants, Kerr said. Across the nation, both groups have a history of being under-counted.

"We have a big job — a bigger one than that faced by most communities," Kerr said.

When the federal government made public its initial numbers Monday, it gave local governments 15 working days to prepare any objections or challenges. Census workers already have made a commitment to recount areas where local govern-

PLEASE SEE CENSUS, 3B

# Dade double-checks preliminary count by Census Bureau

CENSUS, *FROM* 1B

ments raise substantial questions of accuracy, Kerr said.

"So we're looking over the Census Bureau's shoulder to make sure that every housing unit was contacted," Kerr said.

Overall, the county is not in great disagreement with the preliminary federal figure for all of Dade: 1,912,473 people. That total represents only 15,527 fewer people than Metro-Dade's own estimate.

But in some municipalities, more people could mean more federal money. Some U.S. funding programs are linked to the final census totals; state revenue-sharing and gas-tax allotments also are at stake.

A decade ago, the official 1980 census calculated Miami's population at 346,681. But the cutoff date for that census was April 1, 1980 — just before tens of thousands of Mariel refugees and Haitian refugees streamed into Miami.

Local politicians protested that the area was shortchanged in the census. In December 1980, President Carter signed an executive order to include the immigrants in federal-aid formulas — but not in the official census count.

The order covered immigrants who arrived between April 1 and Sept. 30 of that year. For the purpose of calculating federal aid, Dade gained 92,030 residents. For fiscal purposes, Miami's population rose 53,130, to 399,811, bringing the city about $3 million more a year in federal money.

When compared with the official 1980 census figures, this year's preliminary numbers show Miami has grown by 1.7 percent, to 352,492. But when compared to the adjusted '80 number, the city's population has dropped 47,319 — nearly a 12 percent decline.

Miami administrators are vigorously questioning the latest census figures.

Frank Castenada, director of the city's Community Development Department, estimated that the numbers could cost the city millions of dollars in federal money.

Castenada said there has been "a tremendous miscount. Do you really believe the population of Miami has shrunk 11 percent?"

Miami Beach city manager Rob Parkins also plans to challenge the U.S. figures, which show 91,341 residents for the city.

"We're using Dade County planning department figures from 1987 of 99,936," Parkins said. "Now, that's clearly different from the 91,000-some that I saw this morning."

Using such diverse sources as property tax listings and building permits, county analysts will compare Metro-Dade's figures with the federal census.

The computerized double-check will cover the entire county block by block, not just the unincorporated areas, Kerr said.

"With the census bureau, the relationship is not adversarial," Kerr said. "It's teamwork — we're doing our part and they're doing their part to get the best possible count."

*Herald staff writer Carl Goldfarb contributed to this report.*

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# Phila. population down 9%, preliminary figures show

# Census: Phila. lost 9%

## Pa. drops to 5th-largest state

By Neill A. Borowski
*Inquirer Staff Writer*

Philadelphia's population fell by 9 percent in the last 10 years, a far larger decline than had been expected, according to preliminary 1990 census figures released yesterday.

A statewide decline of 1 percent ran counter to the anticipated growth of 1 percent in census estimates for 1989.

Florida passed Pennsylvania to become the nation's fourth-most populous state.

However, the numbers announced yesterday are likely to change because the U.S. Census Bureau hasn't finished counting yet, bureau officials cautioned.

If the tentative population numbers for the city are an accurate indication of the final count, Philadelphia could lose an even larger-than-anticipated share of its political representation and federal and state funding, which often is based on population totals.

Totals were released so local government officials could review and challenge housing unit and population counts. Numbers for New Jersey and Delaware were released last week.

"The census is still in progress, and we won't have the complete count until December," Philip Lutz, local review coordinator for the bureau's Philadelphia office, said yesterday.

In August 1980, some preliminary census reports were found to be far off the mark when final tallies were

(See CENSUS on 17-A)

CENSUS, from 1-A

released later in the year.

The early census figures released yesterday showed Philadelphia's population totaled 1,543,313 on April 1 — down nearly 145,000 from 1980. Estimates for 1989 by the bureau showed the city had lost only about 41,000 residents, or 2 percent.

Between 1970 and 1980, Philadelphia lost nearly 262,000 residents, or 13 percent of its population.

David A. Baldinger, deputy director of the city Planning Commission, said city officials expected at worst a 3 percent to 4 percent decline in the 1980s. He said the bureau might add to the city's count, though. "They tell us they still have people out in the field," he said yesterday.

The Census Bureau has furnished the city with a computer tape that shows a block-by-block count of housing units. The tape will be compared with a tape of a list of housing units from utility hookups to search for discrepancies, Baldinger said.

Yesterday's bureau numbers showed 665,283 total housing units in the city. The city has maintained that the total is closer to 720,000, and the bureau's working list of addresses included 690,000 possible units, Baldinger said.

The early numbers from the 1990 census showed:

- Pennsylvania's population is 11,764,434, down 1 percent from 1980. The 1989 census estimate showed a 1 percent increase.
- The eight-county Philadelphia metropolitan area's population showed little growth in the 1980s. The total was 4,784,749, up 1 percent from 1980. The bureau had estimated that, as of 1988, the area's population had grown 4 percent.
- Bucks, Chester and Gloucester Counties showed double-digit percentage gains, although not as much as expected in the 1988 estimates. Delaware County's population shrank by 2 percent.
- Pittsburgh was even harder hit than Philadelphia. The population of Pennsylvania's second-largest city was 364,379, down 14 percent. Population in Lancaster and Allentown was up 1 percent over 1980. Reading's population was down less than 1 percent, and Harrisburg's was down 3 percent.
- As expected, growth was tremendous in Monroe and Pike Counties as New York and North Jersey commuters moved in and helped boost the northeastern counties by 35 percent and 52 percent, respectively.
- In percentages, Chester grew the most of any Philadelphia-area county, 17 percent, followed by Gloucester (14 percent) and Bucks (12 percent). Among other counties: Lancaster was up 16 percent, Berks, up 7 percent; Lehigh, up 6 percent, and Northampton, up 9 percent.
- Like Philadelphia, population in some other large cities fell more than expected. New York's early total was 7,033,179, down 1 percent. Chicago was down 9 percent and Detroit was down 19 percent. Houston gained only 1 percent, which is less than expected. Los Angeles was up 15 percent.
- The United States total stood at nearly 246 million, less than the more than 250 million previously estimated by the bureau.

The 1990 census has been plagued by headaches. Not as many people as expected returned their census forms by mail. And census takers also found themselves far behind deadline in knocking on doors to count people who had not mailed the forms.

Yet some demographers say it's too early to begin to say the 1990 census was wrong because it is so far off in some areas from 1988 and 1989 population estimates. The bureau makes estimates by updating the 1980 totals using birth, death and migration statistics while the census is intended as a count of every individual.

"I think it's premature to tear them apart," said Gordon F. DeJong, who heads Penn State's graduate program in demography.

Martin K. Holdrich, senior economist at Woods & Poole Inc. in Washington, said some 1980 census final numbers were adjusted from the early counts. "The basic answer is I don't really know if they're [the 1990 preliminary numbers] off or not. They are preliminary and they are subject to local review," said Holdrich, whose firm sells demographic projections for states and counties.

Towns and cities have 15 days to review the housing counts and offer objections to the Census Bureau. Bureau official Lutz yesterday said some local officials from New Jersey already had contacted the Philadelphia regional office.

And if the 1990 preliminary numbers are like the 1980 figures, the changes may be significant.

For example, the Bucks County preliminary count in 1980 understated the population by nearly 20,000, or 4 percent of the final. Population was understated by 4 percent in Chester County and 3 percent in Burlington and Montgomery Counties (reliable preliminary data on other area counties are not available) by the 1980 preliminary counts.

Consider Penndel, Bucks County, which preliminary 1980 figures showed lost 13 percent of its population from 1970. When final numbers were released, Penndel actually showed a population gain of 18 percent. The preliminary number was 26 percent off from the final number of 2,703.

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# Where did 4 million people go?

## Census falls short of projections

**By GARY BLONSTON**
Herald Washington Bureau

WASHINGTON — Last April, the U.S. Bureau of the Census estimated that the American population had climbed above a monumental level — one-quarter billion.

But preliminary results from the 1990 Census add up to about four million fewer than that — 245,837,681 — a figure that is not only less majestic but will likely fuel more complaints that the census has failed to count large numbers of Americans.

The census has taken a beating this year over the way it has gone about counting the country. And for the past two weeks, as the Census Bureau has released figures it has carefully described as "partial and incomplete" for review by state and local governments, its own earlier estimates and projections have been

*PLEASE SEE* **CENSUS, 28A**

# Census numbers total fewer than forecast

**CENSUS,** *FROM* **1A**

used to attack those results, however preliminary.

Especially in cities and states that could lose federal funds and political power because they lost population or didn't grow much, the census has been accused of sloppy methods, wrong assumptions, lack of diligence and, at bottom, a failure to count everyone.

As the numbers stand today, eight Southern and Western states are expected to pick up 19 congressional seats, led by California with seven and Florida with four, while 13 mostly Northern and Midwestern states lose.

So powerfully did population growth in the country shift west and south that five states wound up accounting for 68 percent of all the growth in the 1980s — California, Florida, Texas, Georgia and Arizona.

The nation gained 19.292,000 people in the decade. But [illegible] the four large census regions, the Northeast gained only 900,000 people and the Midwest fewer than 400,000, according to calculations by the Population Reference Bureau.

Such a massive regional shift in numbers and political power has heightened the rancor toward the census, but that alone doesn't satisfy census officials' puzzlement about why they are under such attack.

"The criticism is harsher this time than last," says the census' assistant director, Peter Bounpane. "It's a lot uglier this time, and I don't know why that is. It makes it hard for everyone involved. It's hard to work together when we're all calling each other names."

The name-calling actually began in earnest after the 1980 census, which measured the dramatic population changes of the 1970s. In decades before that, the census numbers were generally taken at face value, because illegal immigration had not been such a major issue, urban blight had not set in as relentlessly, and the country had not undergone such large geographic shifts in population.

But in 1980, the final count varied from the earlier estimate by five million. Though the total was higher than the estimate, not lower, more than 50 lawsuits were filed challenging the results. Most went nowhere, but the arguments were so complex that some of the cases are pending to this day.

The numbers that have been released to every governmental unit in the country will undergo review and possible revision wherever a local government can present ev dence in the next three weeks t convince census officials that the probably missed some people.

But demographers don't expec those revisions to add anything lik four million people to the count.

And so, at the end of the year when the final population snapsho of April 1 is released, it will probabl remain below the bureau's much used estimate of 250 million.

Paul Voss, a University of Wisconsin demographer, says, "W probably won't know for three o four years from now how well the did. The fact the counts are comin in low doesn't necessarily mean th census is bad, though it might mea that."

## Sun Belt to gain political clout in 1990 Census

From Herald Wire Services

WASHINGTON — The Sun Belt will gain more political clout when the 1990 Census is completed. The preliminary numbers show that Florida will gain four congressional seats, and California seven — giving the largest state a whopping total of 52 congressmen.

According to the numbers, six other states are expected to gain U.S. House seats and presidential electoral votes and 13 states are expected to lose House seats and electoral votes in presidential elections. State legislatures will draw the new district lines in time for the 1992 elections.

House seats are redistributed among the states after each census. Because the number is limited to 435 seats, when a growing state gains a seat some other state must lose one. Although still tentative and subject to change, here are the winners and losers:

**GAINING SEATS:** California, 7; Florida, 4; Texas, 3; one each to Georgia, Arizona, North Carolina, Virginia and Washington.

**LOSING SEATS:** New York, 3; Illinois, 2; Michigan, 2; Ohio, 2; Pennsylvania, 2; one each from Iowa, Kansas, Kentucky, Louisiana, Massachusetts, Montana, New Jersey and West Virginia.

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# Politics, not logic, controls census review decision

**STEPHEN K. DOIG**

THE NUMBERS GAME

Sometime before July 15, U.S. Commerce Secretary Robert Mosbacher must decide whether the 1990 census should be adjusted to include those who were missed last April — basically, to count the uncounted.

Perfectly sound statistical techniques exist for estimating how many people weren't counted in each jurisdiction, so an adjustment seems to make a lot of sense.

But this isn't a question of logic; this decision will turn mostly on politics.

Remember, those most likely to have been missed — typically, young black males and illegal aliens — also are most likely to be living in large, predominantly Democratic cities.

Thus, it's no surprise that big city mayors, including Miami's Xavier Suarez, are howling for the adjustment in hopes of increasing their cities' share of both federal grant money and political representation.

Nor should we be astonished that Mosbacher, a good Republican appointee, so far has shown little enthusiasm for a procedure that can only diminish the clout of his party's prime constituency.

Let's face it: The arguments would be just as loud, though on opposite sides, if it was middle-class, suburban whites who weren't filling out their census forms. One party's adjustment, after all, is another's manipulation.

Even before the preliminary counts came out last fall, and right up to the "semi-final" city and county numbers released last week, the Census Bureau was being accused all over the country of gross negligence in its count.

To hear some mayors and congressmen, you'd think their districts had been declared ghost towns.

But now let's put what the Census Bureau has done in perspective.

Assume that as many as five million people — which indeed is more than the population of all but 15 states — were missed. That's the outer limit of most reasonable estimates of the under-count.

Sounds awful . . . until you compare that to the 249 million who did get counted. That's a national accuracy rate of 98 percent — at worst.

Of course, the percentage missed will vary by locality. Suarez, for instance, claims as many as 60,000 were missed in Miami alone. If so, Miami's official 358,548 head count would be only 85 percent accurate.

But Suarez had little proof to offer beyond anecdotal evidence. The grim fact is that the same factors that keep someone from being counted by census enumerators — transience, fear of the government, illegal status — make it almost impossible to document them in other ways.

The difficulties of the 1990 census, actual or perceived, may finally bring about a change that many demographers have favored for years: abandonment of the expensive ($2.6 billion for the 1990 census) pretext that a census must tally each individual in the country.

Instead, they argue, we should begin frequent national demographic surveys using scientific random-sampling techniques. We'd get essentially the same information, at essentially the same level of accuracy, and it wouldn't be obsolete before the decade was half over.

Sounds logical — even for the politicians.

* * *

Just how can they count the uncounted, anyway? I'll explain in next week's "Numbers Game." Each week in this space, "Numbers Game" will try to help you make some sense of the numbers that identify us, describe us, group us, and, all too often, confuse us.

You'll find all sorts of odd topics covered here: demographics, probability, surveys, statistics, computers, logic, gambling, cryptology . . . well, you get the point.

And, no, you won't have to be a mathematician to follow along — because I'm not one, either. send your questions or comments to: Steve Doig, The Miami Herald, One Herald Plaza, Miami, Fla., 33132.

Pretty soon, you'll begin to see life as a "Numbers Game."

In fact, you can count on it.

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# City officials question census figures' validity

**By LYDIA MARTIN**
Herald Staff Writer

Leaders of several cities are questioning the validity of the U.S. Census Bureau's preliminary 1990 head count.

Census figures show that Florida City, West Miami, Coral Gables and South Miami have lost residents during the past decade while Sweetwater and Homestead have had substantial increases in population.

What all these cities have in common is that their leaders aren't buying the census numbers.

Tiny Florida City, which had 6,174 residents in 1980, now has 5,562, according to the Census Bureau.

"That's absolutely absurd," said Mayor Otis Wallace. "I think the census takers have decreased in competence. There's been no decrease in population. Somebody just can't count very well."

He said all indications of population — utility customers, construction, building permits, water consumption — are up.

Because its residents are poor, Florida City loses out, he said.

"People are afraid of giving the number of people living in their household," Wallace said. "You have cases where a mother on welfare lives in the unit with the father, but won't verify that he's living there because she thinks she'll have her checks cut off. People are not candid."

Coral Gables registered a decrease of more than 8 percent, from 43,241 residents in 1980 to 39,684 this year.

Mayor George Corrigan said he is skeptical of the census results.

"It's entirely possible that we've gone down, but Cocoplum and Gables Estates, Gables by the Sea — all that's reasonably well developed in the last 10 years."

Corrigan said the city will look at the number of Southern Bell telephone numbers assigned to Coral Gables in 1980 and this year, school enrollment figures and electric meter use.

Local governments have three weeks to object or the preliminary numbers will be considered final.

West Miami will object, said City Manager Jose Matas. The city had 6,076 residents in 1980 and 5,703 this year.

"We don't accept that figure," Matas said. "Those figures are absolutely important because Tallahassee uses them in determining how much money a city receives."

Matas said it is obvious population has increased in West Miami.

"I see a lot of garages being converted to efficiencies, illegal or otherwise. This city is in a transition stage. There used to be a lot of retirees here, but now there are a lot of families with children, cats, dogs, mothers-in-law and what-have-you. I think there are a lot of illegal people hiding for fear of being deported."

Sweetwater council member Matilde Aguirre said the same thing is true in her city. According to the census, Sweetwater had 8,251 residents in 1980 and 13,657 this year.

Homestead showed a 27.3 percent increase in population, from 20,668 to 26,313.

But Tom David, assistant to the city manager, said the census missed almost 3,000 people. He said the city projects its population closer to 29,000 based on things such as the number of customers using the city's utilities.

"I think they missed it," he said.

## POPULATION CHANGES

These figures show the change in population in South Dade municipalities between the 1980 census and the preliminary count in the 1990 census.

| City or town | 1980 census count | 1990 preliminary count | Percent change |
|---|---|---|---|
| Coral Gables | 43,241 | 39,684 | -8.23% |
| Homestead | 20,668 | 26,313 | +27.3% |
| Florida City | 6,174 | 5,562 | -9.91% |
| South Miami | 10,944 | 10,291 | -5.97% |
| Sweetwater | 8,251 | 13,657 | +65.5% |
| West Miami | 6,076 | 5,703 | -6.14% |

# Suarez letter suggests Census undercounted city by 60,000

**By RICHARD WALLACE**
Herald Staff Writer

It's a polite but insistent undercurrent of political protest. It targets the U.S. Census and the possibility that it undercounted parts of Dade County, particularly Miami.

Miami Mayor Xavier Suarez has asked U.S. Rep. Ileana Ros-Lehtinen to call for a sophisticated statistical refiguring of the preliminary findings of the federal people hunt, released in August.

In a letter sent to Ros-Lehtinen last week, Suarez complained that despite the initial federal count of 352,492 residents in Miami, city planners "have estimates that as many as 60,000 persons [a potential 18 percent increase] may not have been counted."

As of Wednesday afternoon, Ros-Lehtinen had not received the letter and thus had no chance to respond. She did support Miami's request last fall for a door-to-door recount of specific areas where municipal authorities suspect that the census missed housing units.

Whatever the final totals for Miami and other parts of Dade are, access to myriad federal and state programs — and their money — is at stake.

"For almost any of the federal largess that we have a shot at, much of it relies on population formulas," Suarez said.

"I don't think there's any other city in the United States that has such a high percentage of immigrants — and that's probably the greatest single reason for undercounting," Suarez said.

Suarez is seeking a "post-enumeration adjustment" for Miami that would rely on population sampling methods, similar to the methods used in opinion surveys. They project full-scale totals based on contact with a small percentage of the population.

The call for the statistical adjustment follows the city's earlier request for additional door-to-door canvassing to recount housing units in particular census areas. Numerous other municipal governments in the county, plus Metro-Dade itself, made similar requests. Such requests are routine after each census.

The door-to-door follow-up canvassing — based on local challenges to the number of housing units reported — was widespread in Dade.

"You can only challenge based on housing units. You cannot challenge on actual population," said Frederick Marinelli, grants coordinator for the city of Hialeah. "They did recount certain areas, and we did pick up some units."

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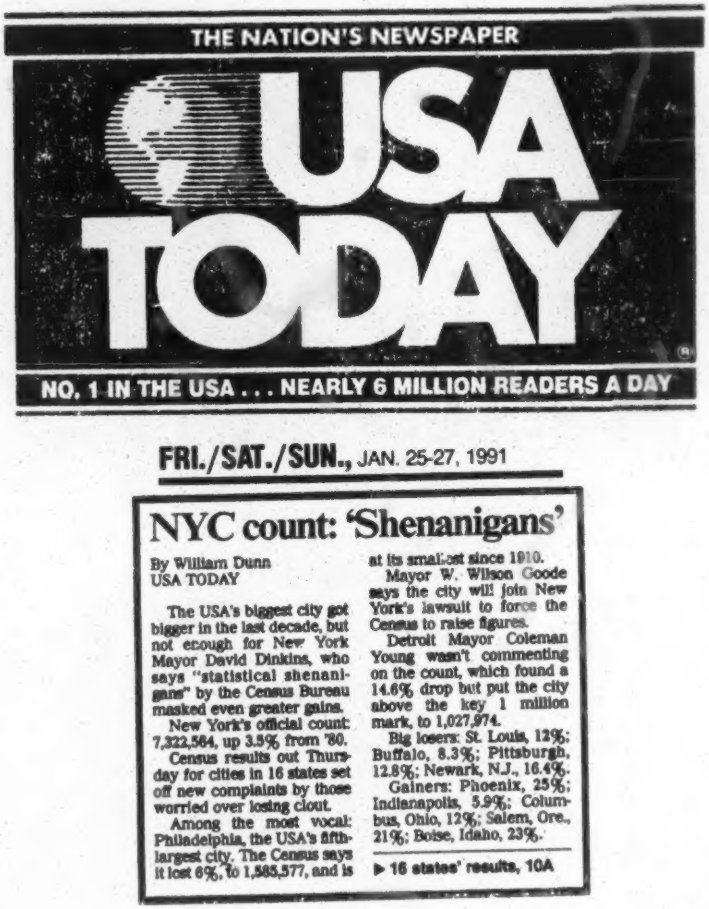

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# NYC count: 'Shenanigans'

By William Dunn
USA TODAY

The USA's biggest city got bigger in the last decade, but not enough for New York Mayor David Dinkins, who says "statistical shenanigans" by the Census Bureau masked even greater gains.

New York's official count: 7,322,564, up 3.5% from '80.

Census results out Thursday for cities in 16 states set off new complaints by those worried over losing clout.

Among the most vocal: Philadelphia, the USA's fifth-largest city. The Census says it lost 6%, to 1,585,577, and is at its smallest since 1910.

Mayor W. Wilson Goode says the city will join New York's lawsuit to force the Census to raise figures.

Detroit Mayor Coleman Young wasn't commenting on the count, which found a 14.6% drop but put the city above the key 1 million mark, to 1,027,974.

Big losers: St. Louis, 12%; Buffalo, 8.3%; Pittsburgh, 12.8%; Newark, N.J., 16.4%.

Gainers: Phoenix, 25%; Indianapolis, 5.9%; Columbus, Ohio, 12%; Salem, Ore., 21%; Boise, Idaho, 23%.

▶ 16 states' results, 10A

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NEIGHBORS

The Miami Herald

THURSDAY
SEPTEMBER 20, 1990

## BEACHES BRIEFING

WHAT'S HAPPENING ALONG THE COAST

### Beach says census overlooked 13,000

Satisfied they have identified almost 13,000 people that the U.S. Census Bureau overlooked in its 1990 count, Miami Beach administrators have asked the bureau to reconsider its numbers.

City administrators calculate that the oversight could shortchange Beach residents the benefit of as much as $5.5 million a year in grant money over the next decade.

City Manager Rob Parkins said the Census Bureau — according to its own accounting — missed at least five large apartment and condominium complexes on Belle Isle alone. He said the bureau's inventory of residential buildings was off by large numbers in other neighborhoods, too.

In preliminary figures released earlier this month, the bureau tallied 91,341 Beach residents compared to the 96,296 it counted in 1980. Factoring in the almost 9,000 housing units and other dwellings they believe the census skipped, city administrators count 104,241 residents.

BONNIE WESTON

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LOCAL
The Miami Herald

SECTION B
SUNDAY, MARCH 31, 1991

F-2

# N. Miami misses census mark by 2

**By HAROLD MAASS**
Herald Staff Writer

Robert Egert and Lee Fischer may be walking, talking proof that North Miami belongs in the municipal big leagues.

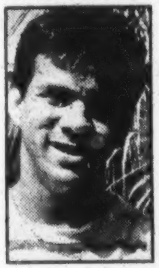
The two east-side North Miami residents said their households were left out of the 1990 census count that left the city two residents shy of the 50,000 population plateau.

City Hall has appealed to the U.S. Census Bureau to give North Miami its numerical due, in part because towns that have climbed to 50,000 are eligible for a share of state and federal grant money reserved for big cities.

North Miami this year would have collected an extra 37 cents per resident from the state if its population had been above the magic number.

"Your opportunities just open up tremendously when you go over the 50,000 mark," said City Planner Ana Rijo-Conde. "You're playing in a different league."

North Miami's case is well-known at the Census Bureau partly because the city is so near to the population mark, said Ed Wagner, a Census Bureau assistant division chief. "It would be a little surprising to me if there were anyone else that close to 50,000," Wagner said.



**THE DIFFERENCE**
*Robert Egert's uncounted household would put North Miami over 50,000.*

Though the city needs just two more residents to reach the plateau, city planners have sent the Census Bureau a list of 112 homes they say were overlooked. The Egert and Fischer households, with five and two people respectively, are two homes on the list of allegedly undercounted blocks. The city also has photos and utility hookup records to show that the homes exist and were occupied during the census count.

But that doesn't mean the count will change.

The people who handle gripes about the census count from the country's 39,000 local governments have received 1,450 letters with questions and appeals, said Wagner. He's in charge of the precisely named Count Question Resolution office.

Every letter gets a reply, but the Count Question Resolution folks don't yet have the power to add or subtract a single person, Wagner said.

The Department of Commerce, which includes the Census Bureau, will decide by July 15 whether to adjust every census block in the country according to a statistical procedure.

Once that decision is made, census officials will consider appeals from cities and counties that provide proof of a miscount, Wagner said. If the population counts are statistically adjusted, local governments would have to prove their population is different from the adjusted count, he said.

In many cases, gaps between local and census figures result not from census errors but from differences in counting methods, Wagner said. In Florida, for example, some local governments count winter residents whom census takers tallied in their summer homes up North, he said. Some people who think they were missed actually made it into the census based on information obtained from neighbors.

The confusion and disagreement can linger a long time.

"We still get letters about the 1980 census," Wagner said.

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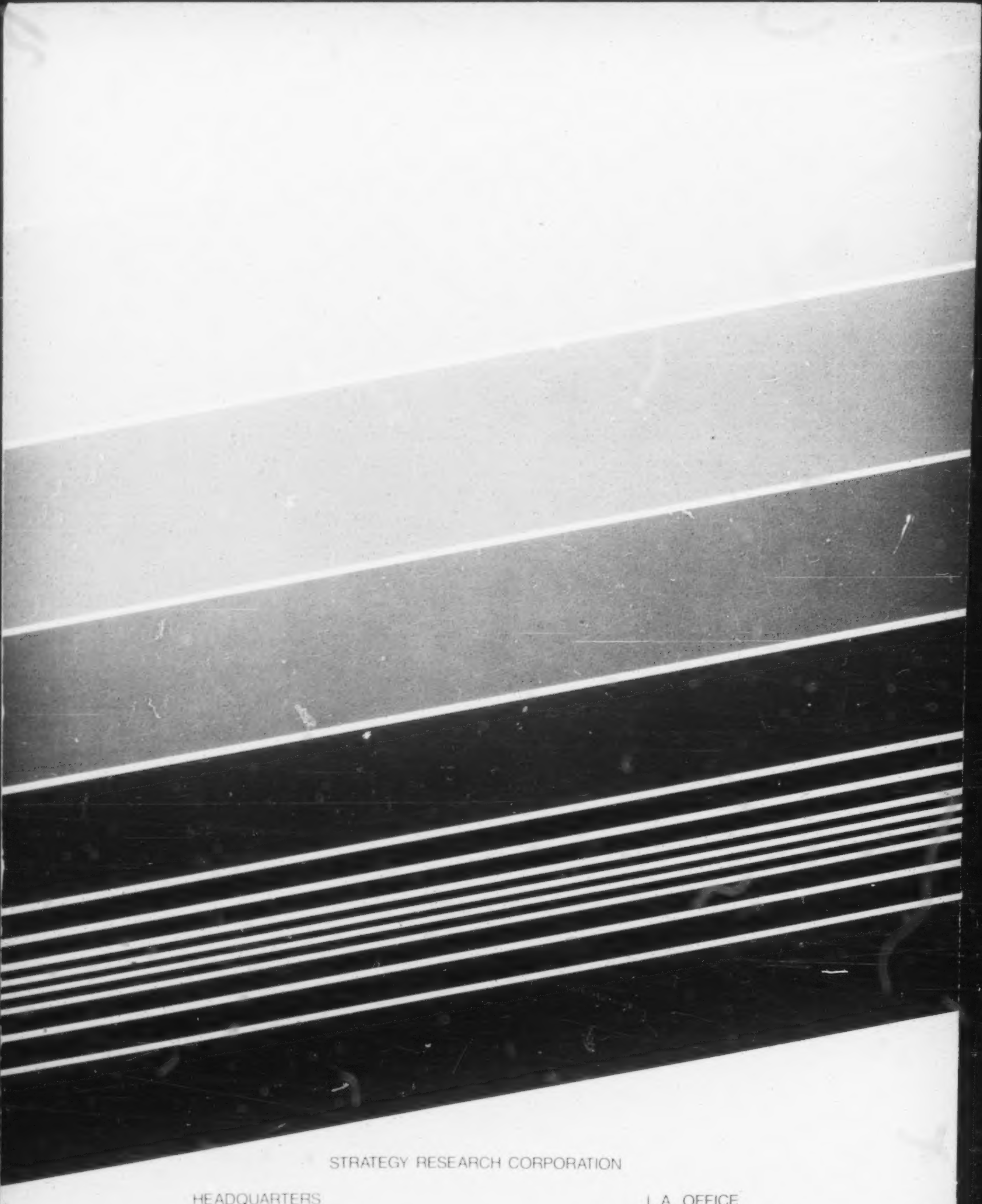

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